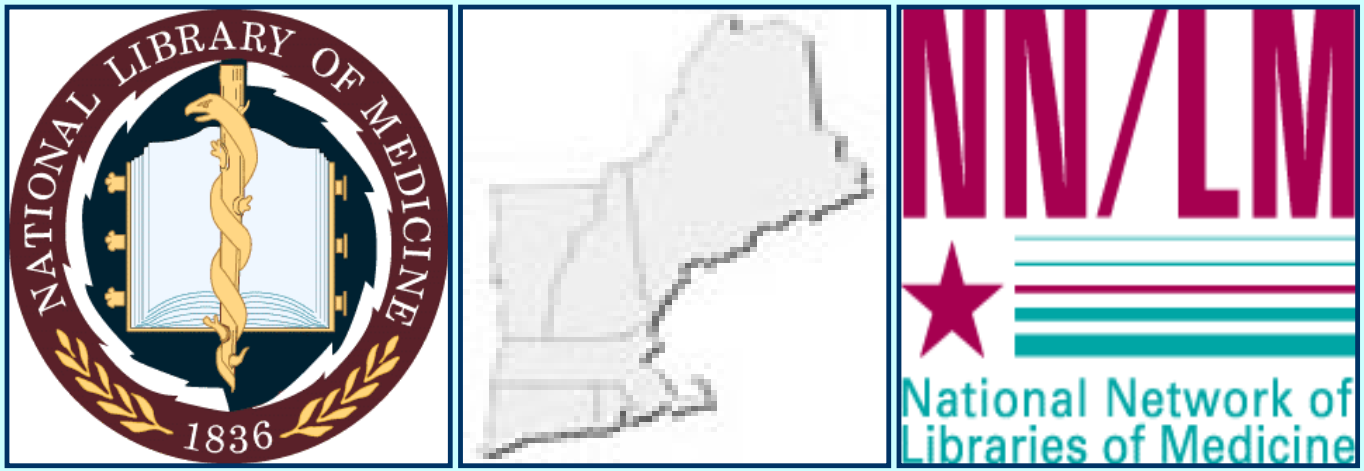
LinkOut Presentation



Mark Goldstein, M.L.I.S.

NN/LM LinkOut Representative

New England Region

Winter 2003

Overview

- **DEFINITIONS**
- **COMMON MISCONCEPTIONS**
- **L.O. PARTICIPATION *for E-Journal Holdings***
- **QUESTIONS *for E-Journal Holdings***
- **L.O. PARTICIPATION *for Print Holdings***
- **QUESTIONS *for Print Holdings***
- **ADVANCED OPTIONS**

Definitions

LinkOut is ...

- **a feature** of NCBI's Entrez database search and retrieval system that handles external linking to PubMed and other "Entrez" databases.
- **a software application** designed to provide users with links to web-accessible resources: full text publications, consumer health sites, etc.
- **a service** that connects PubMed patrons with their library's online journal and serial print collections.
- **an interface tool** that enables patrons to distinguish journal articles available in full text *from* those only available through publisher links.

Common Misconceptions

LinkOut is NOT ...

- **NOT** ***an application that connects patrons to the NLM "universe."***
  Rather: LinkOut is a utility application. PubMed is the NCBI Entrez database that connects patrons to NLM's vast collection.

- **NOT** ***a tool that creates new links to the publisher's Web site.***
  Rather: The Library Submission Utility "facilitates link creation." Direct links to publisher sites are solely provided by PubMed.

- **NOT** ***an application acting as a conduit to a higher level of access.***
  Rather: LinkOut icons provide "quick-'n-easy" access to full text documents, in accordance with pre-existing licensing arrangements.

LinkOut Participation

For E-Journal Holdings

e-Journal LinkOut Participation

Step 1. Familiarize

Step 2. Organize

Step 3. Register

Step 4. "Icon-ize"

Step 5. Input

Step 6. Activate

Step 7. Publicize

LinkOut Participation

For E-Journal Holdings

Step 1.

FAMILIARIZE.

- **NCBI LinkOut Tutorial**

http://www.ncbi.nlm.nih.gov/entrez/linkout/doc/linktutorial.html

- **NCBI LinkOut FAQ's for Libraries**

http://www.ncbi.nlm.nih.gov/entrez/linkout/doc/liblofaq.html

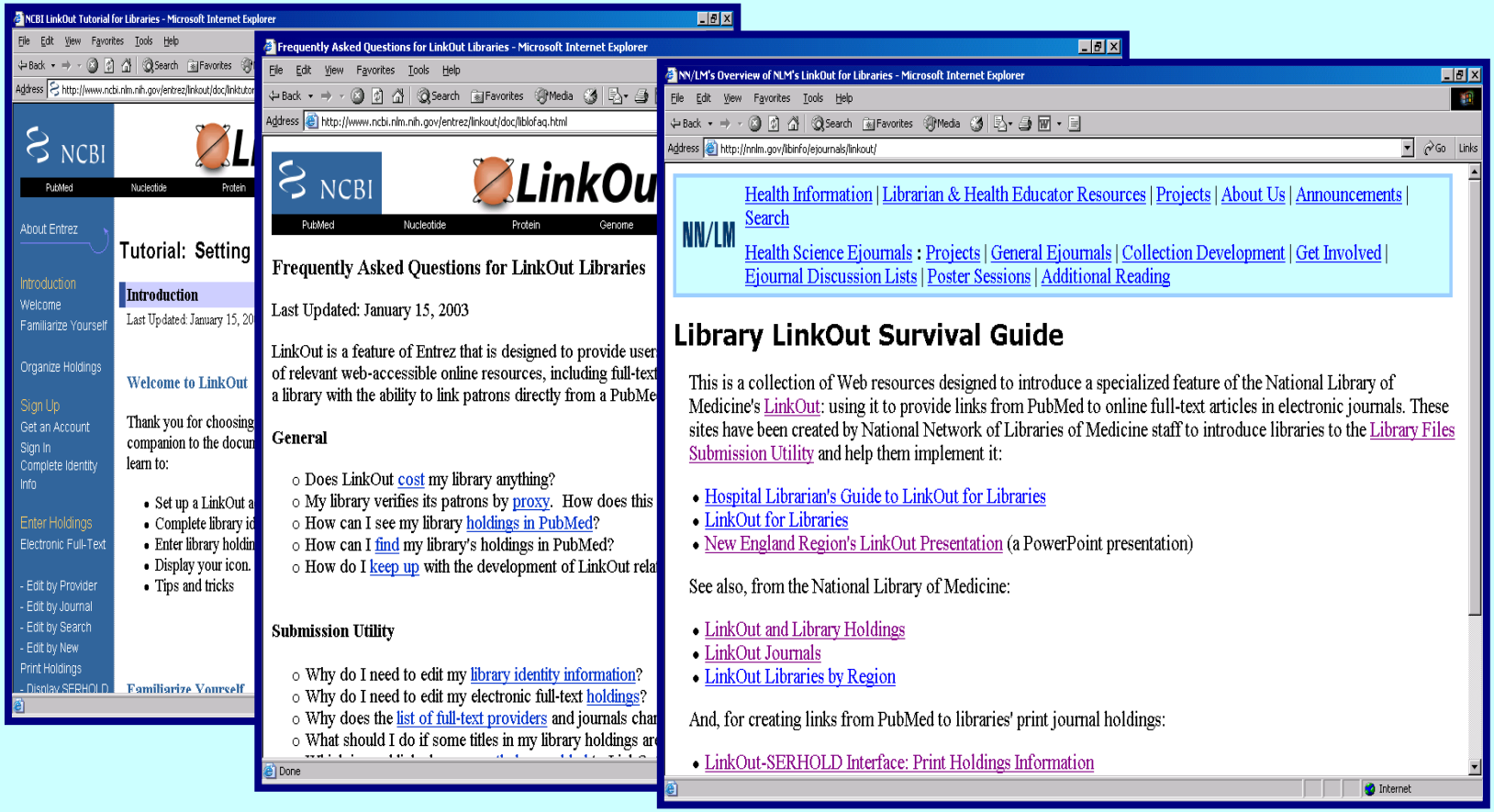
- **NN/LM Overview Page**

http://nnlm.gov/libinfo/ejournals/linkout/

LinkOut Participation

For E-Journal Holdings

Step 1. FAMILIARIZE (cont'd)



LinkOut Participation

For E-Journal Holdings

Step 2.

ORGANIZE.

- **Discuss LinkOut program with your library staff.**
- **Assign a contact person for LinkOut maintenance, to:**
  - **Analyze online journal licensing arrangements made with providers.**
  - **Develop a physical listing of holdings; arrange alphabetically by journal title –or- by provider (include volumes and years held.)**
  - **If necessary, contact providers to create additional journal links.**

mark.goldstein@umassmed.edu

LinkOut Participation

For E-Journal Holdings

Step 3.

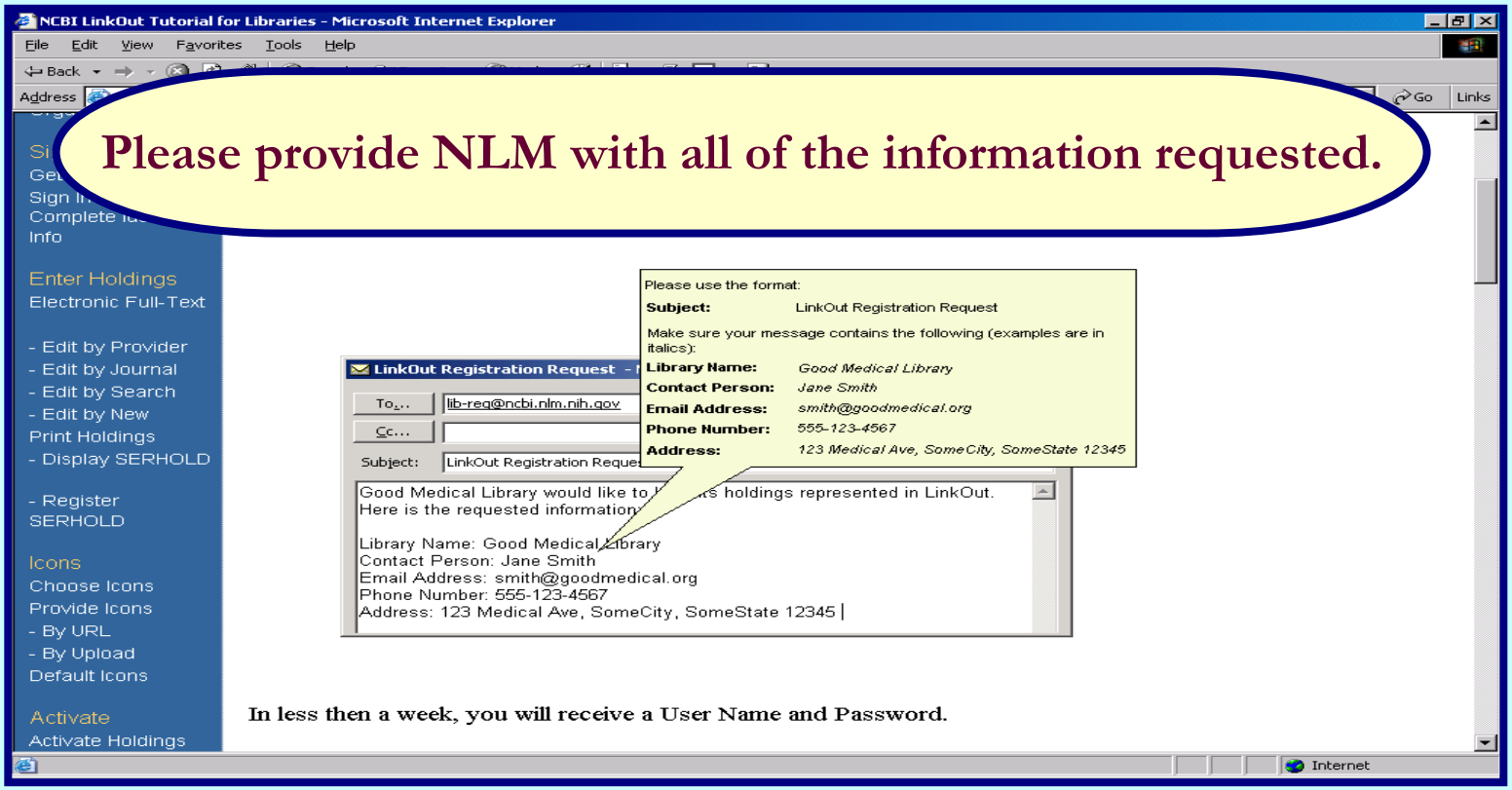
REGISTER.

- Send e-mail to: lib-reg@ncbi.nlm.nih.gov
- NLM will then send your library an assigned User Name & Password.
- The User Name:
  - provides access to the Library Submission utility; and
  - creates a "special PubMed URL" displaying your library's icon.

LinkOut Participation

For E-Journal Holdings

Step 3. REGISTER (cont'd)



LinkOut Participation

For E-Journal Holdings

Step 4.

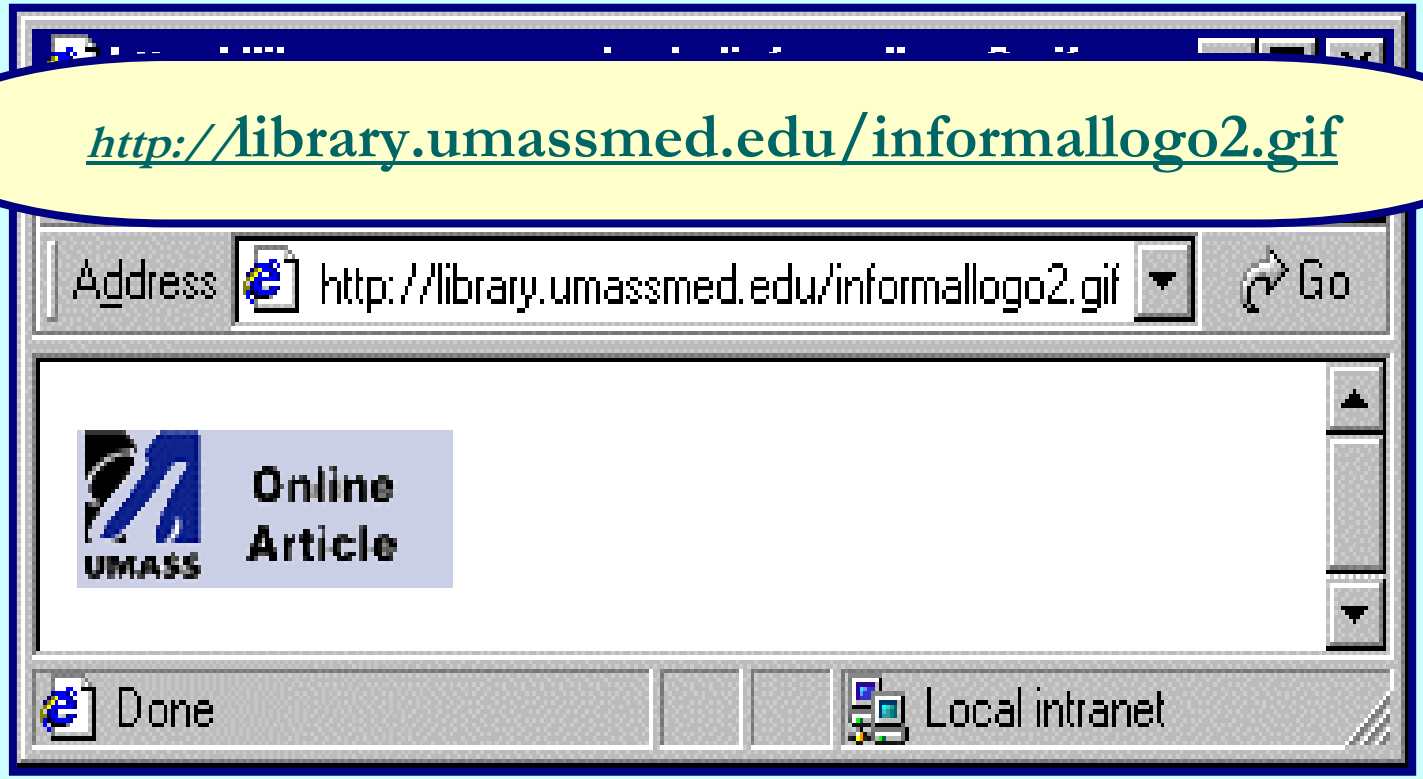
ICON-IZE.

- Create icon to represent library (*ex.* institutional logo.)
- Please follow design parameter guidelines:
  - recommended size: 100 x 25 pixels
  - must have an outline of a button
  - must be readable and easily recognizable
- If you do not provide own,
  NCBI will provide a default icon:

LinkOut Participation

For E-Journal Holdings

Step 4. ICON-IZE (cont'd)



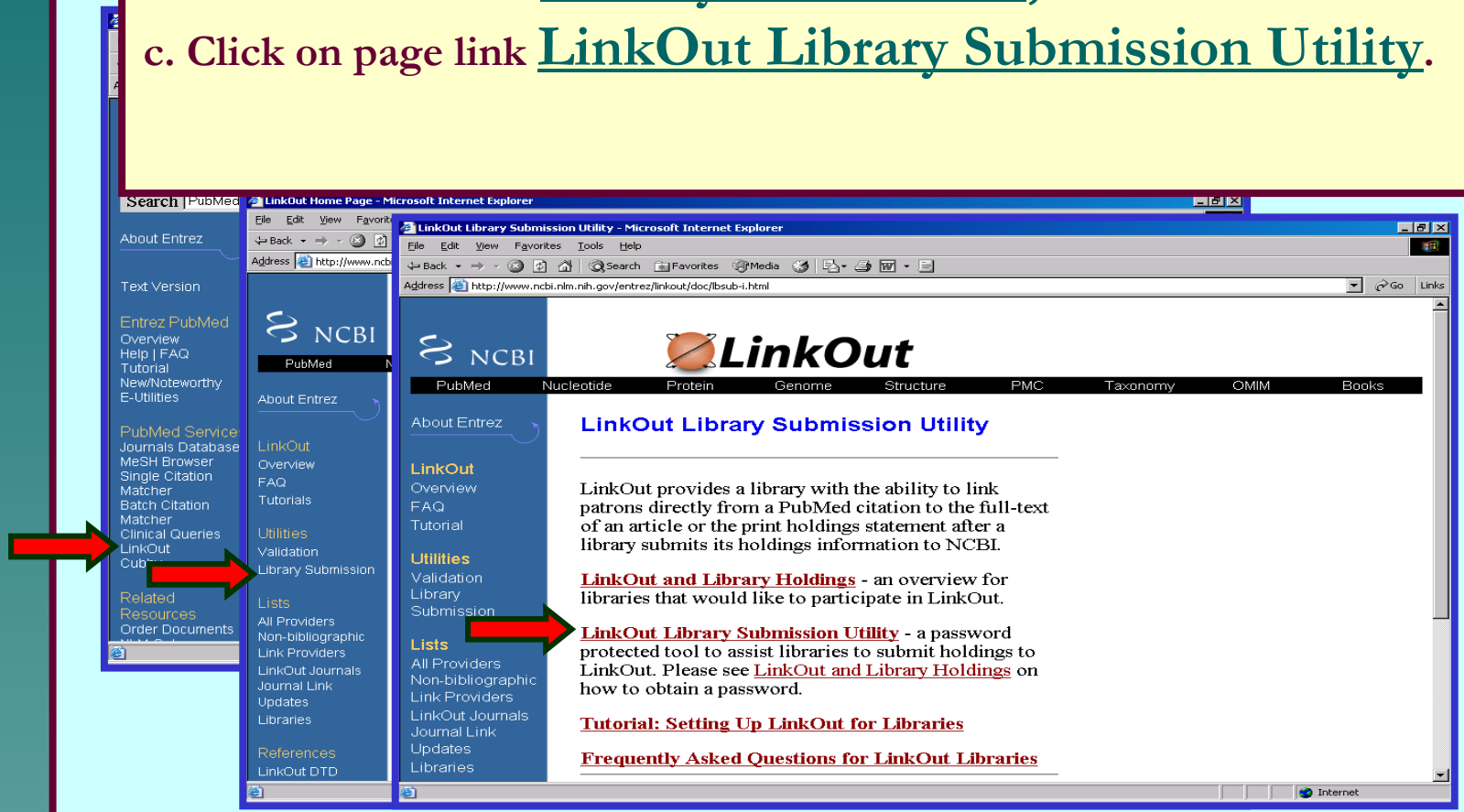
➲NAVIGATION

TO LOG IN TO LIBRARY SUBMISSION UTILITY:

a. Select sidebar link **LinkOut**, under **PubMed Services** header.

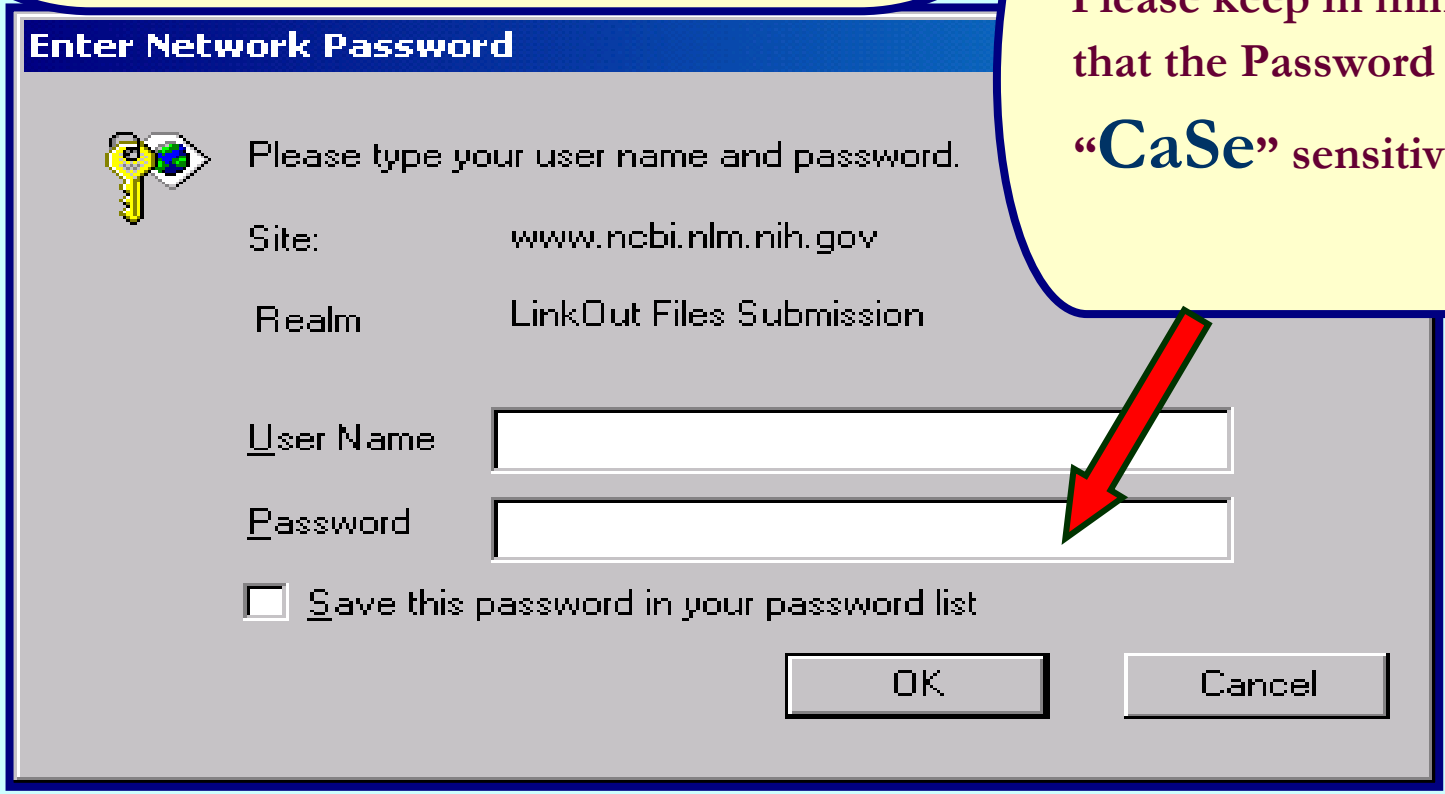
b. Select sidebar link **Library Submission**, under **Utilities** header.

c. Click on page link **LinkOut Library Submission Utility**.



LinkOut Participation

A grey pop-up window will appear to log into the **Files Submission Utility.**



Please keep in mind that the Password is **"CaSe" sensitive.**

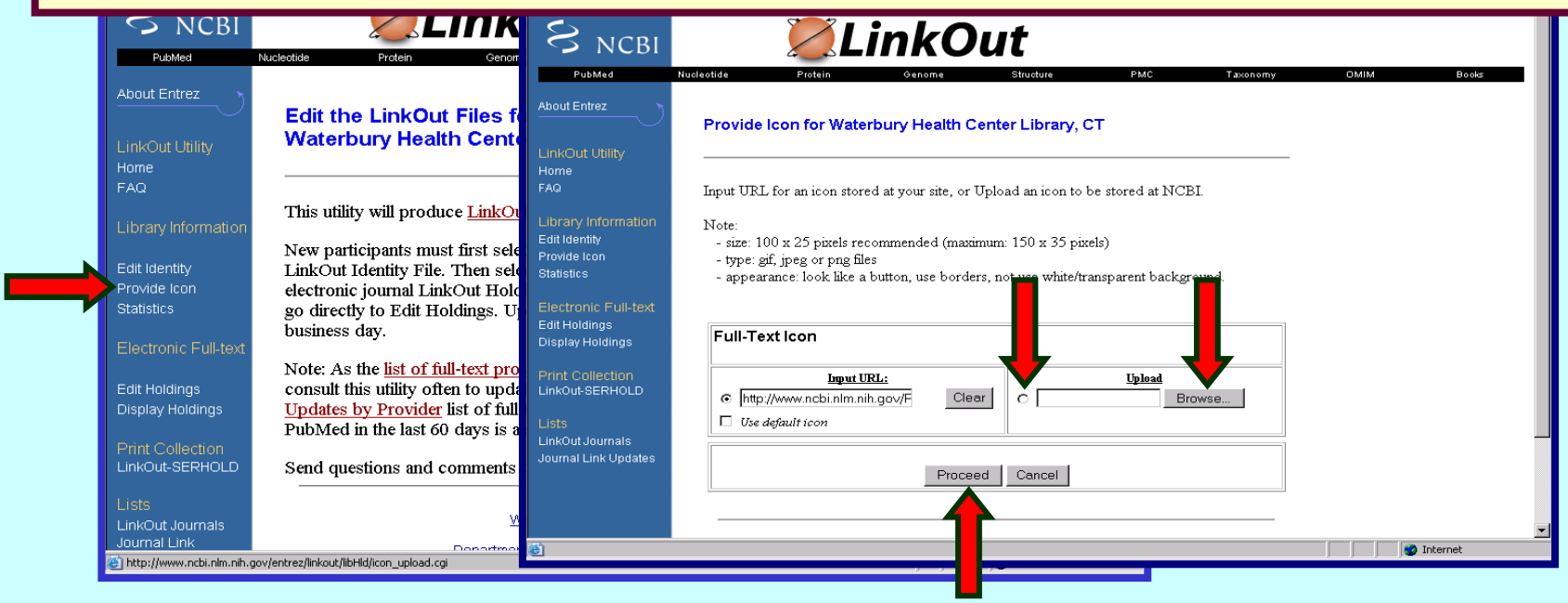
➲NAVIGATION

TO UPLOAD ICON:

a. Select sidebar link **Provide Icon**, under **Library Information** header.

b. Click right radio button and **Browse** button to upload your icon.

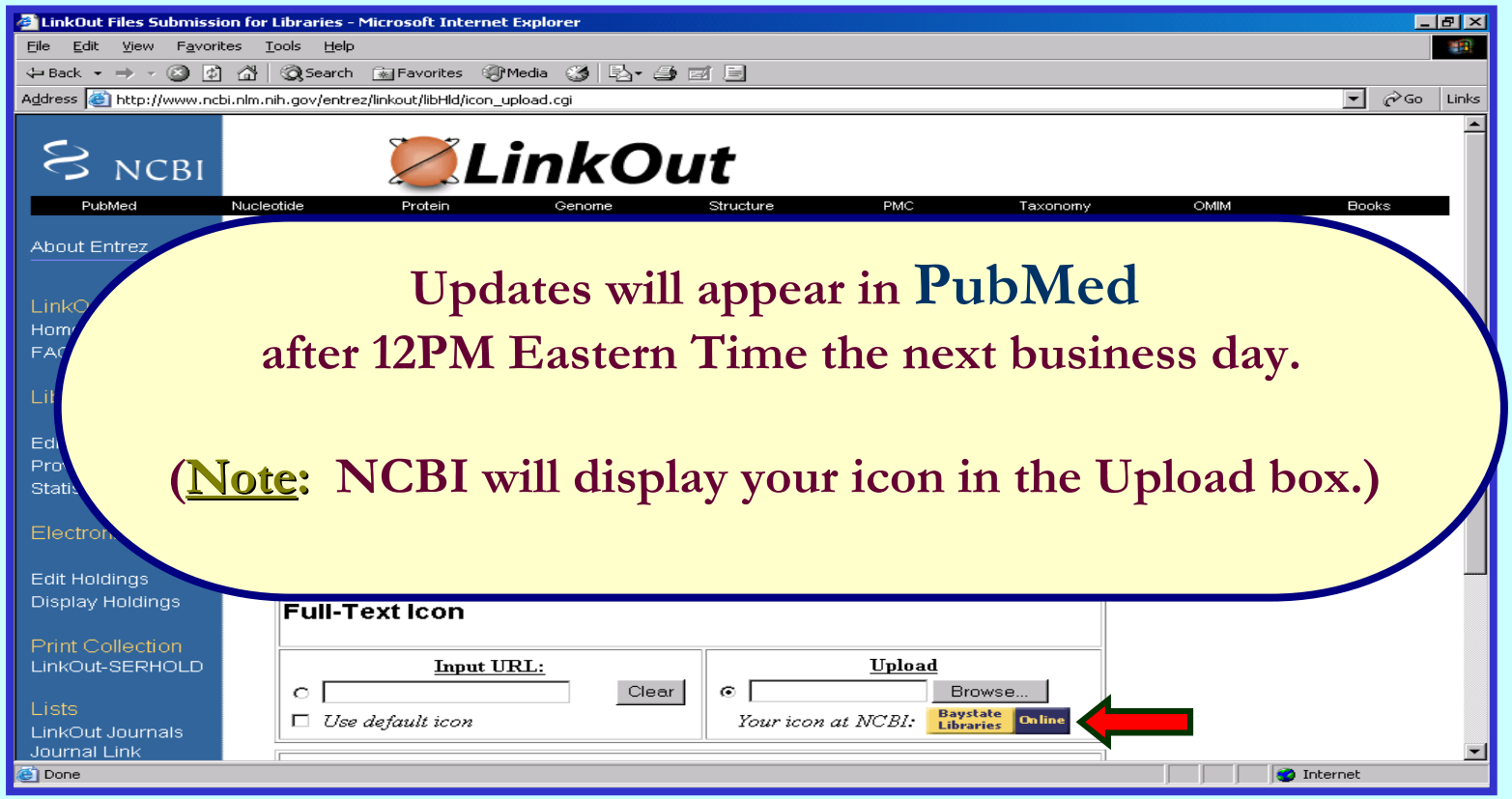
c. Click on **Proceed** button to transmit icon to NCBI.



LinkOut Participation

For E-Journal Holdings

Step 4. ICONIZE (cont'd)



Updates will appear in **PubMed**
after 12PM Eastern Time the next business day.

(**Note:** NCBI will display your icon in the Upload box.)

LinkOut Participation

For E-Journal Holdings

Step 5. INPUT.

- Log in to Library Submission Utility.
- Select "Edit Identity" to build your Identity File, which contains information about your library.
- Select "Edit Holdings" to build your Holdings File.
- Unlike the "short story," it's not necessary to complete input in one sitting – pace yourself.

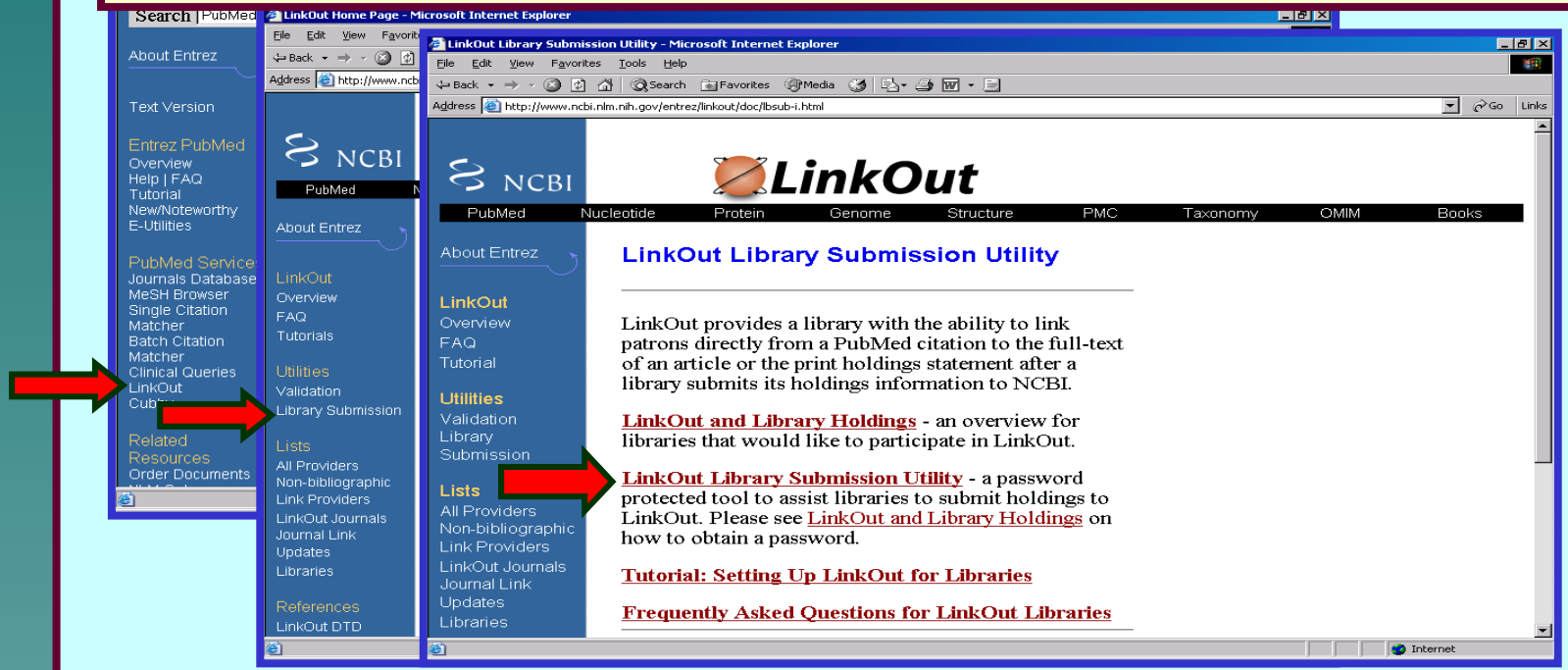
➲NAVIGATION

TO LOG IN TO LIBRARY SUBMISSION UTILITY:

a. Select sidebar link LinkOut under **PubMed Services** header.

b. Select sidebar link Library Submission under **Utilities** header.

c. Click on page link LinkOut Library Submission Utility.



LinkOut Participation

A grey pop-up window will appear to log into the **Files Submission Utility.**

Please keep in mind that the Password is **"CaSe" sensitive.**

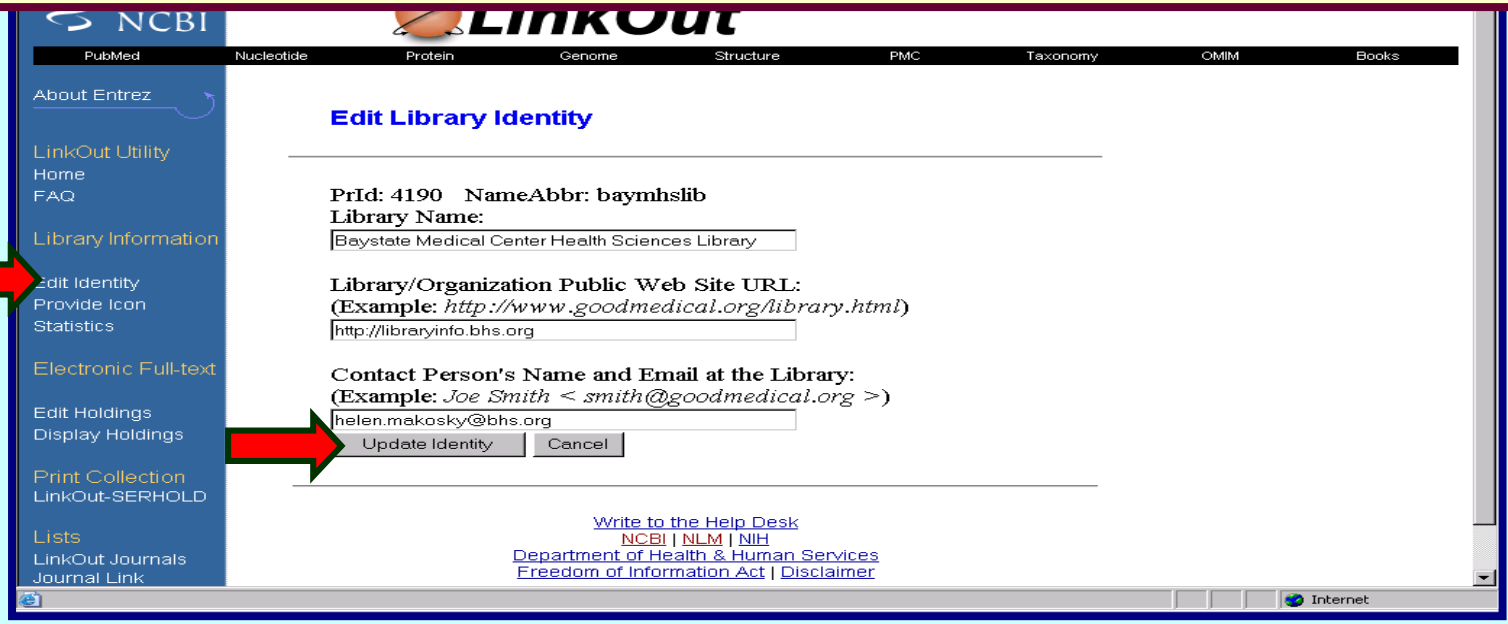
➲NAVIGATION

TO EDIT IDENTITY FILE:

a. Select sidebar link **Edit Identity** under **Library Information** header.

b. Supply information for three fields: Library Name, Public Web Site URL, and Contact Name/Email.

c. Click on **Update Identity** button to submit changes.



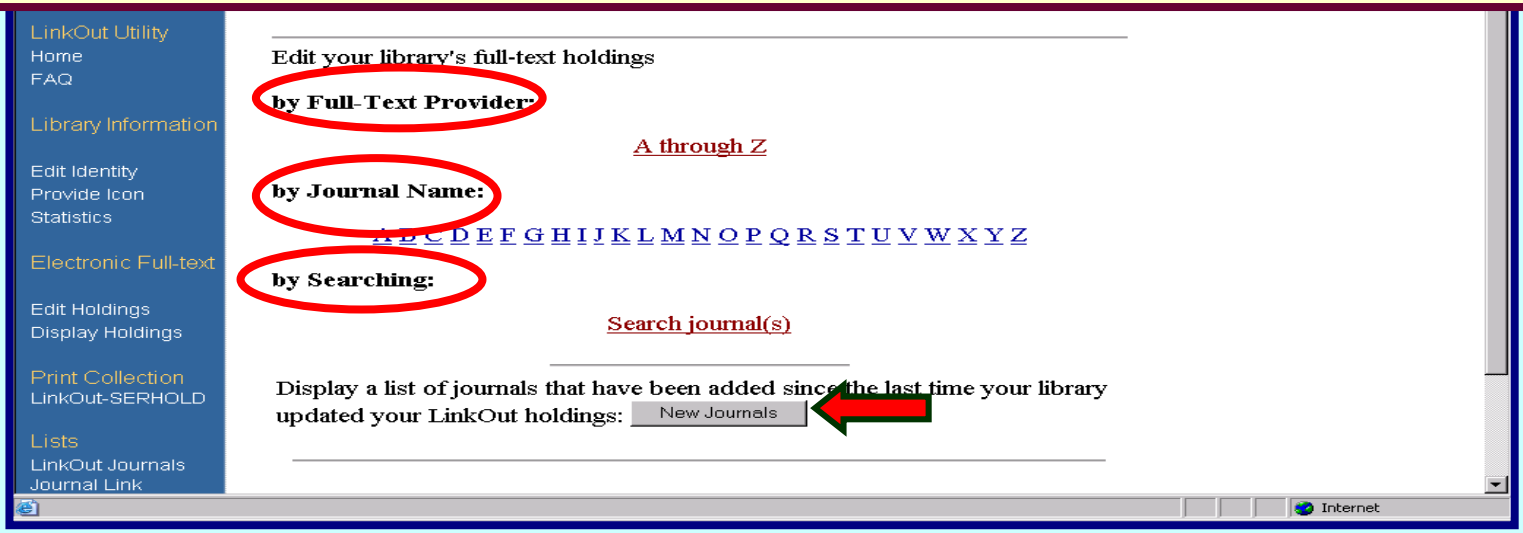
➲NAVIGATION

TO EDIT HOLDINGS FILE:

a. Select sidebar link **Edit Holdings** under **Electronic Full-Text** header.

b. Edit holdings by three methods: by **Full-Text Provider**, by **Journal Name**, or by journal **Searching**.

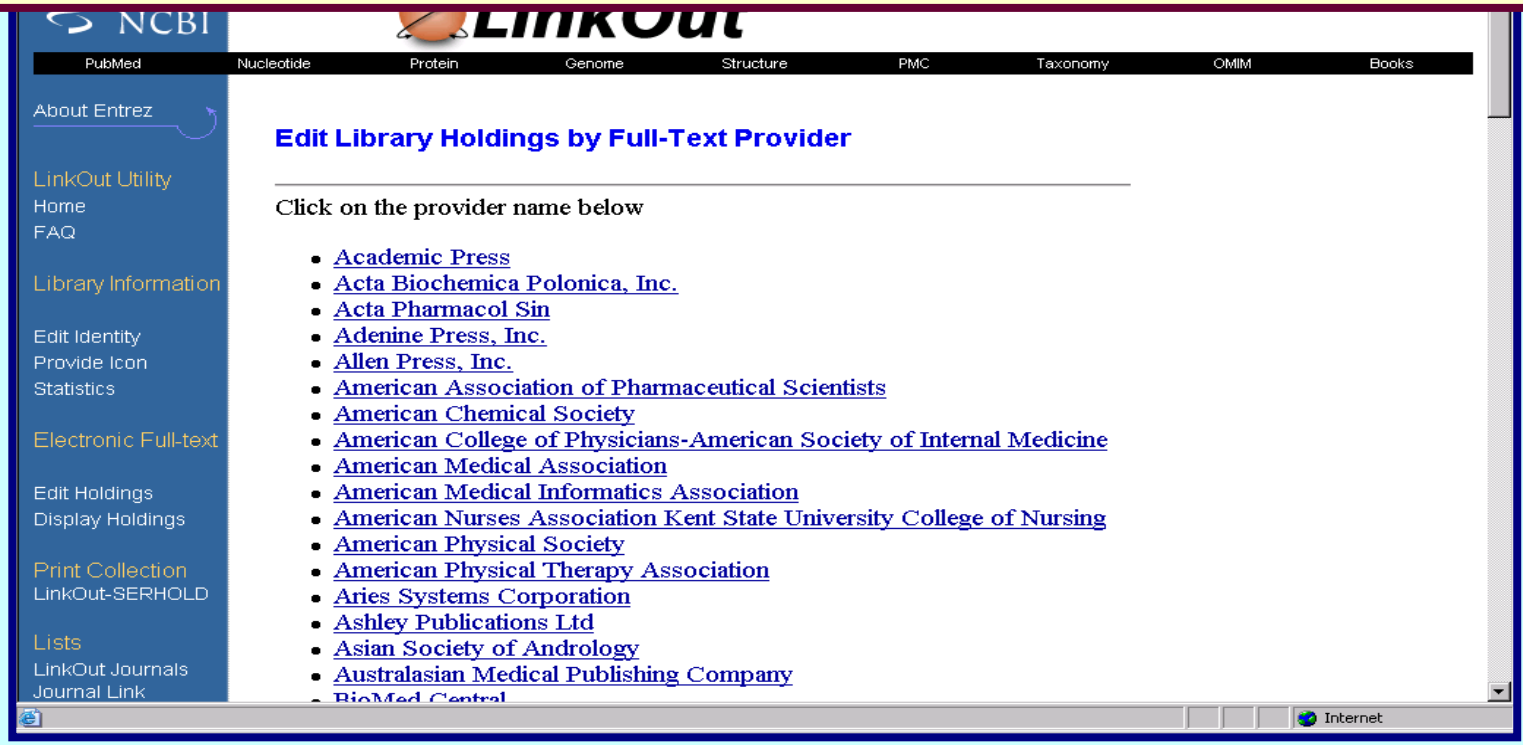
c. Also, you can display a list of new journals added since your last update by clicking on **New Journals** button.



➲NAVIGATION

TO EDIT HOLDINGS BY FULL-TEXT PROVIDER:

a. Select a provider page link from the provider list.



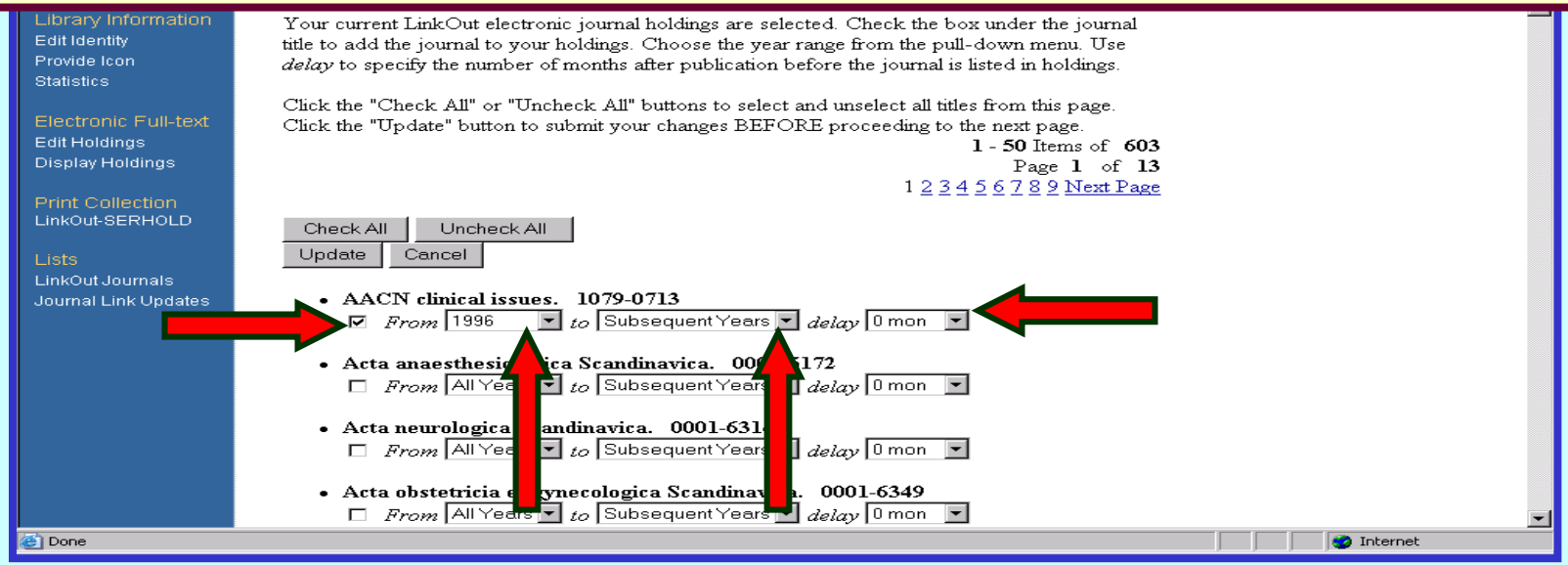
➲NAVIGATION

TO EDIT HOLDINGS BY FULL-TEXT PROVIDER:

b. Check the appropriate checkboxes, in accordance with preexisting provider arrangements.

c. Click on listbox arrows at **From** and **To** fields, indicating holdings span.

d. Click on listbox arrow at **Delay** field to specify number of months delayed, following publication of a particular journal listed in your holdings.

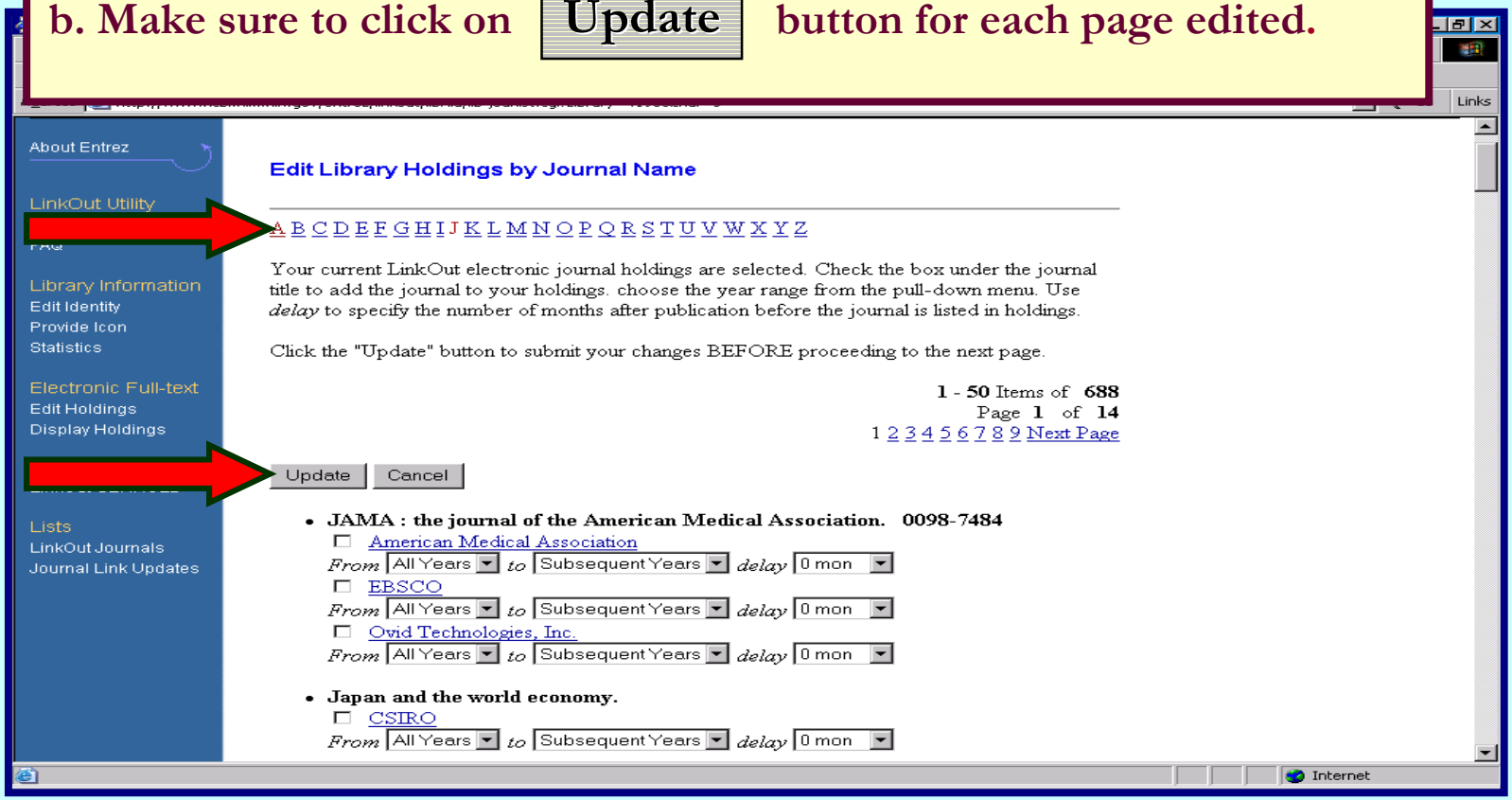


➲NAVIGATION

TO EDIT HOLDINGS BY JOURNAL NAME:

a. Select a journal letter for an alphabetical listing.

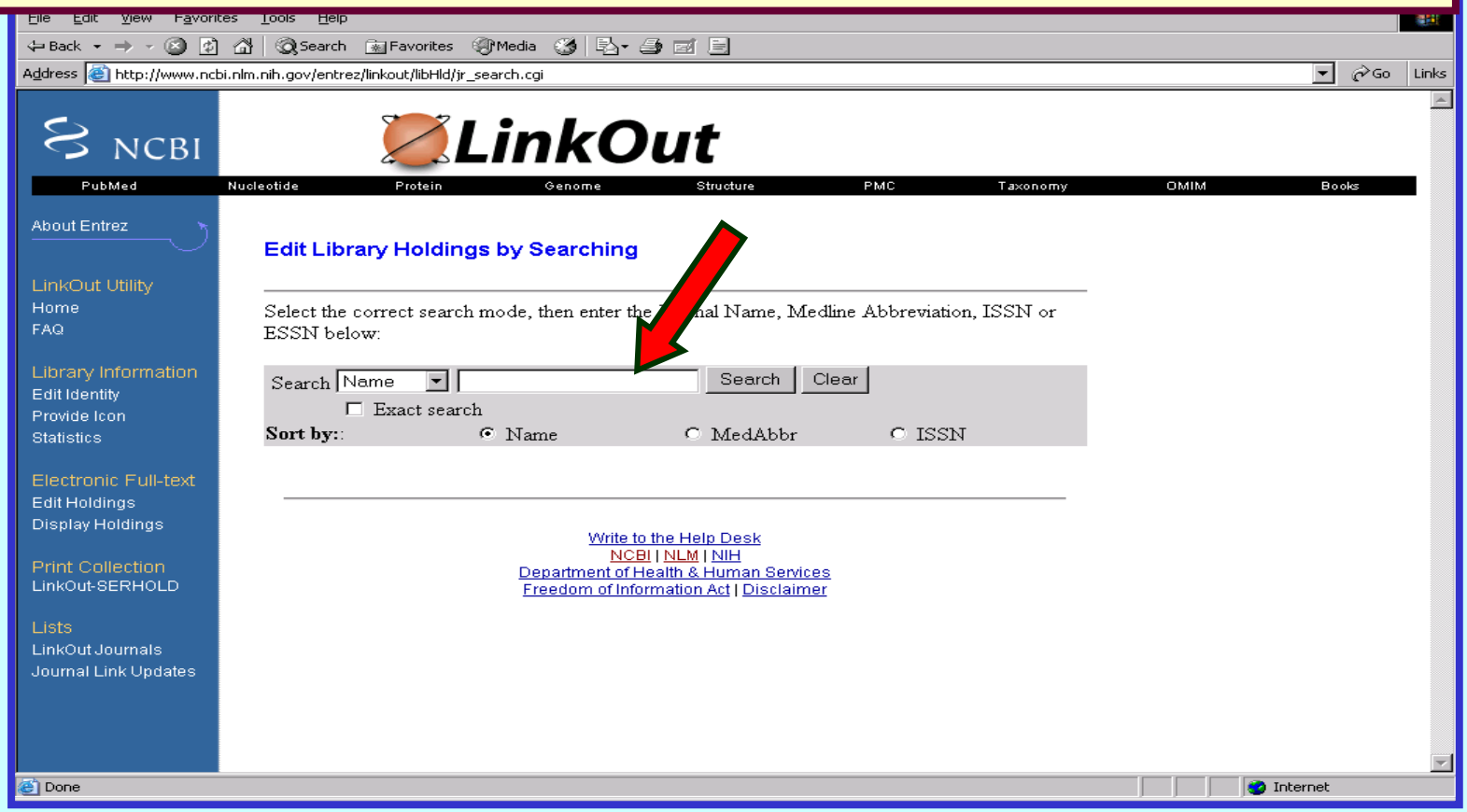
b. Make sure to click on **Update** button for each page edited.



➲NAVIGATION

TO EDIT HOLDINGS BY SEARCHING:

Select a specific journal name.

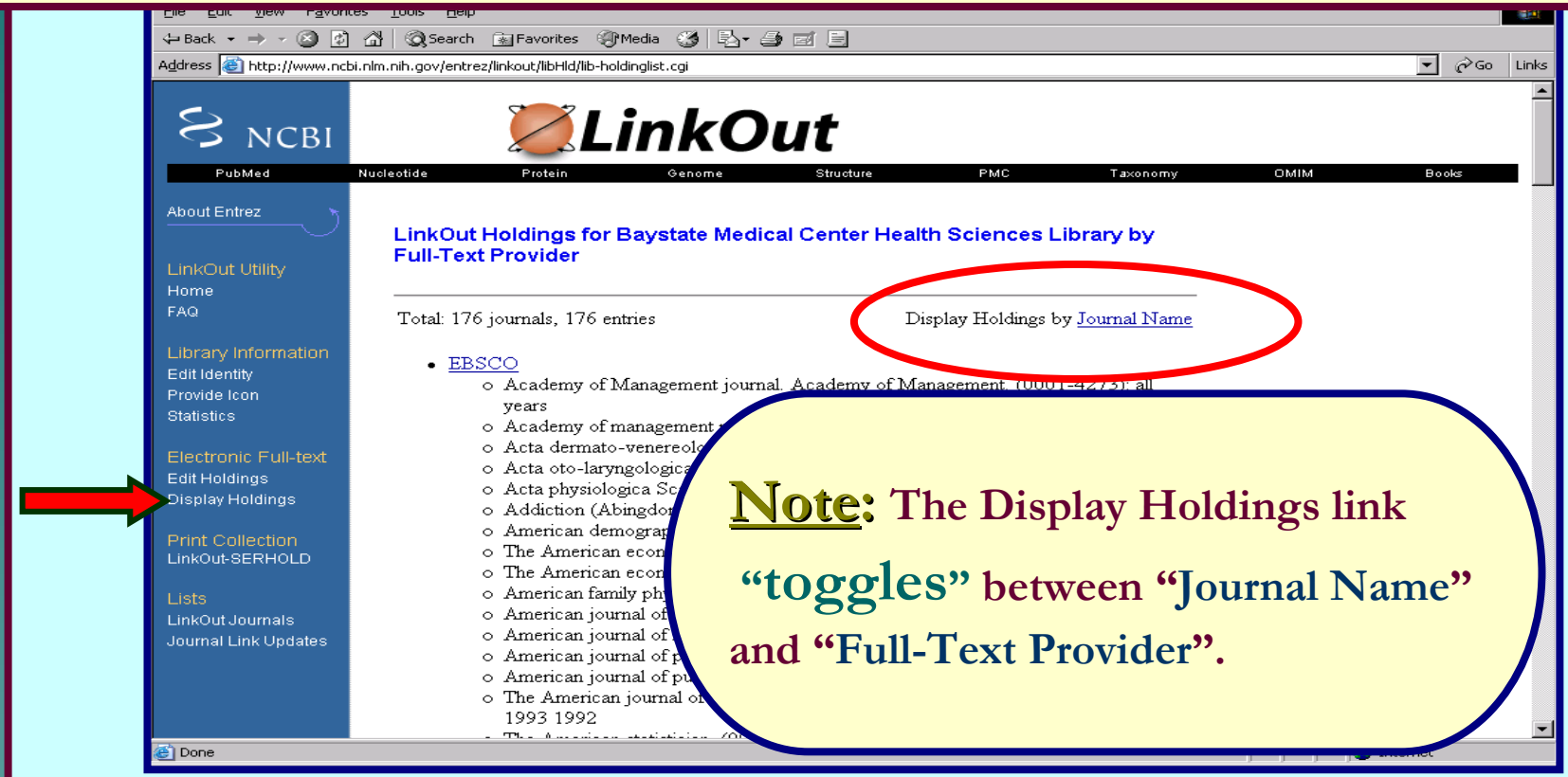


➲NAVIGATION

TO DISPLAY HOLDINGS:

a. Select sidebar link **Display Holdings** under **Electronic Full-Text** header.

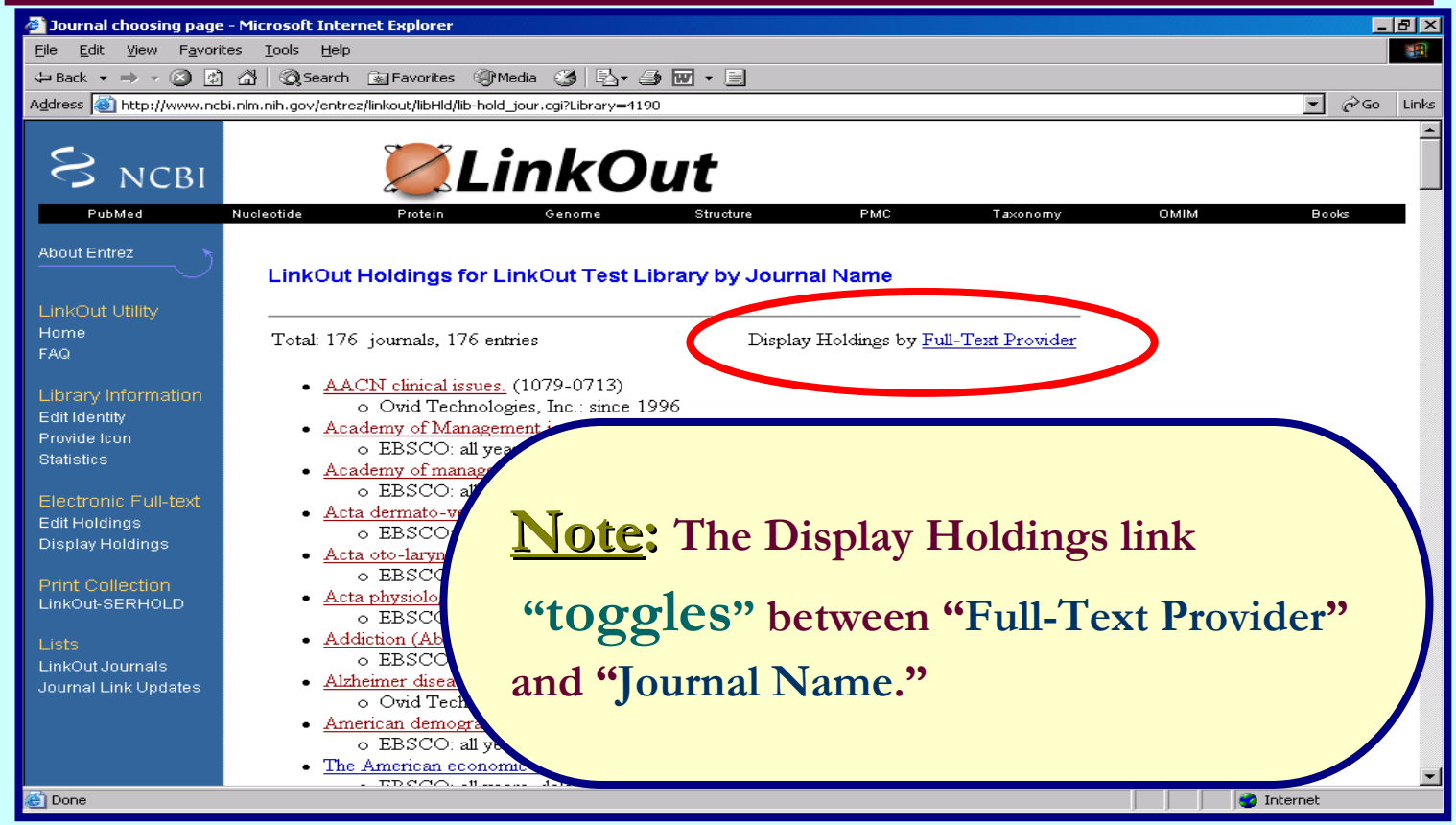
b. Your holdings will display on sort order by **Full-Text Provider ...**



➲NAVIGATION

TO DISPLAY HOLDINGS:

b. … or on sort order by **Journal Name.**

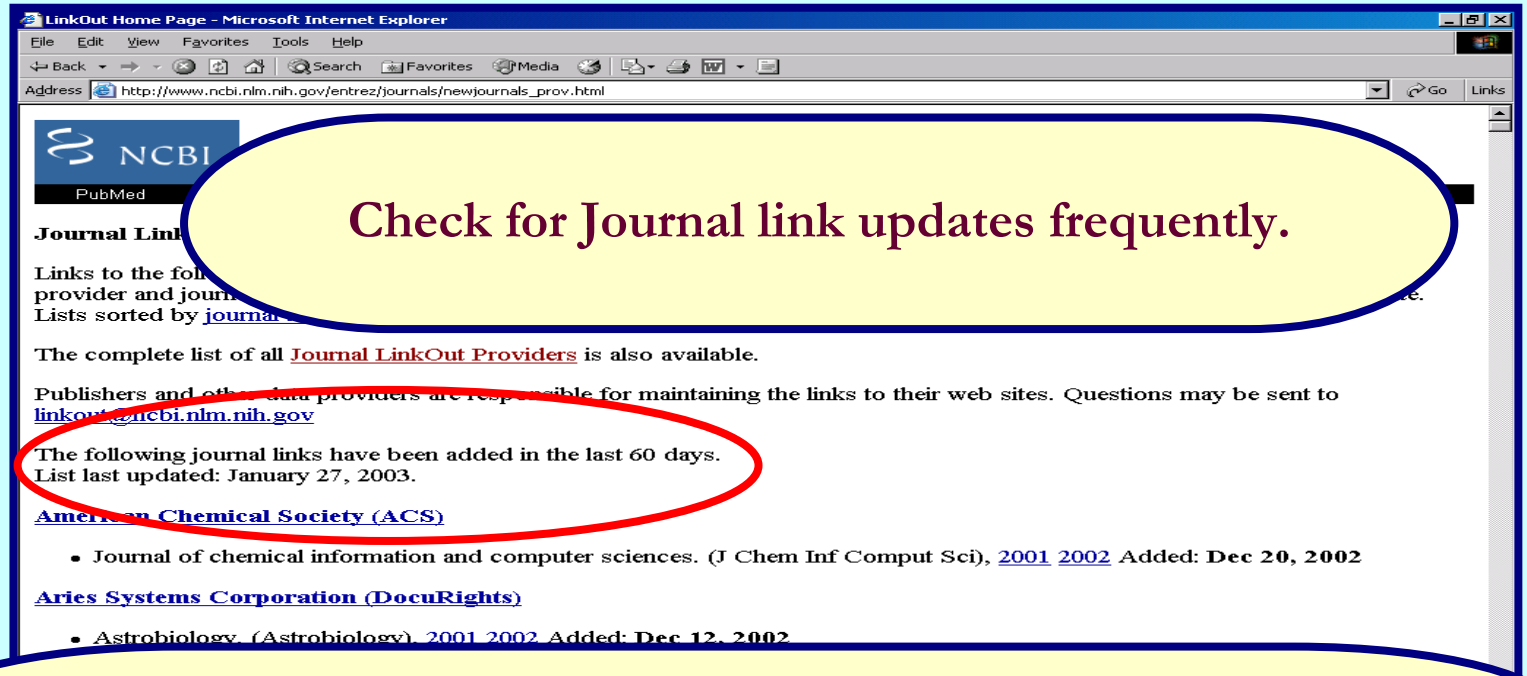


Note: The Display Holdings link "toggles" between "Full-Text Provider" and "Journal Name."

LinkOut Participation

For E-Journal Holdings

Step 5. INPUT (cont'd)



Check for Journal link updates frequently.

http://www.ncbi.nlm.nih.gov/entrez/journals/newjournals_prov.html

LinkOut Participation

For E-Journal Holdings

Step 6.

ACTIVATE LINKS.

- **Once you've completed the input of holdings, the Submission utility will record changes in NCBI's LinkOut database and "rebuild" your Holdings file.**

- **Your library icons will be available in PubMed the next business day; icons will display on those citations related to journal links included in your Holdings File.**

LinkOut Participation

For E-Journal Holdings

Step 7.

PUBLICIZE.

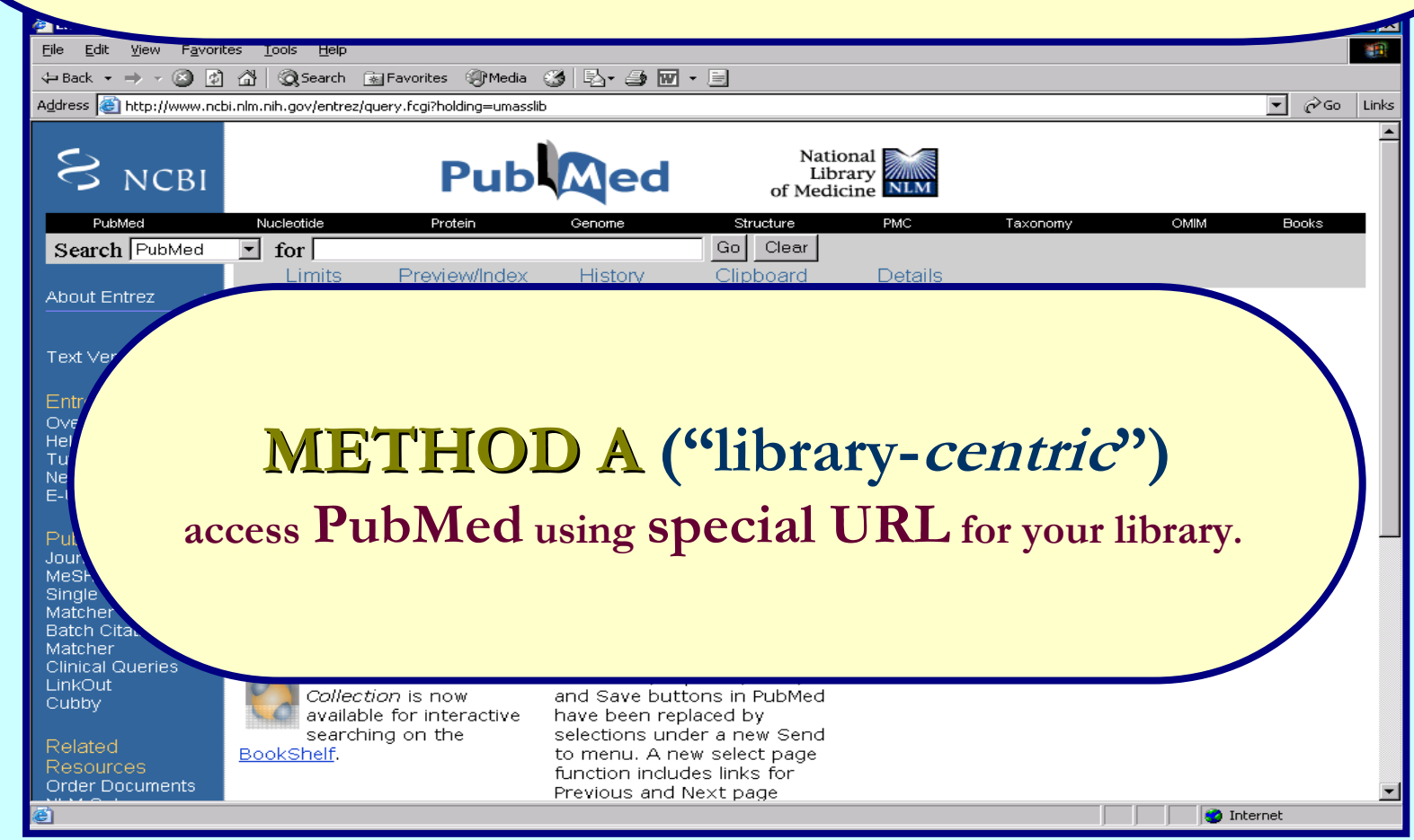
PubMed patrons may access holdings by 2 methods:

METHOD A. **the preferred method -- "library-*centric*":**
patrons use the special PubMed URL from Web site.

METHOD B. **the alternate method -- "cubby-*centric*":**
patrons tailor Cubby account with LinkOut preferences.

LinkOut Participation

*http://*www.ncbi.nlm.nih.gov/entrez/query.fcgi?holding=umasslib



METHOD A ("library-*centric*")

access **PubMed** using **special URL** for your library.

METHOD B ("cubby-*centric*")

customize Cubby account with LinkOut Preferences.

LinkOut Participation

For E-Journal Holdings

Step 7. PUBLICIZE (cont'd)

- Place the "special PubMed" icon prominently on your library web page and inform your patrons.
- If a library has links to both electronic and print holdings, two icons will appear: one linking to a full-text display of the online article; and one linking to information about your print holdings.

LinkOut Participation

For E-Journal Holdings

Step 7. PUBLICIZE (cont'd)

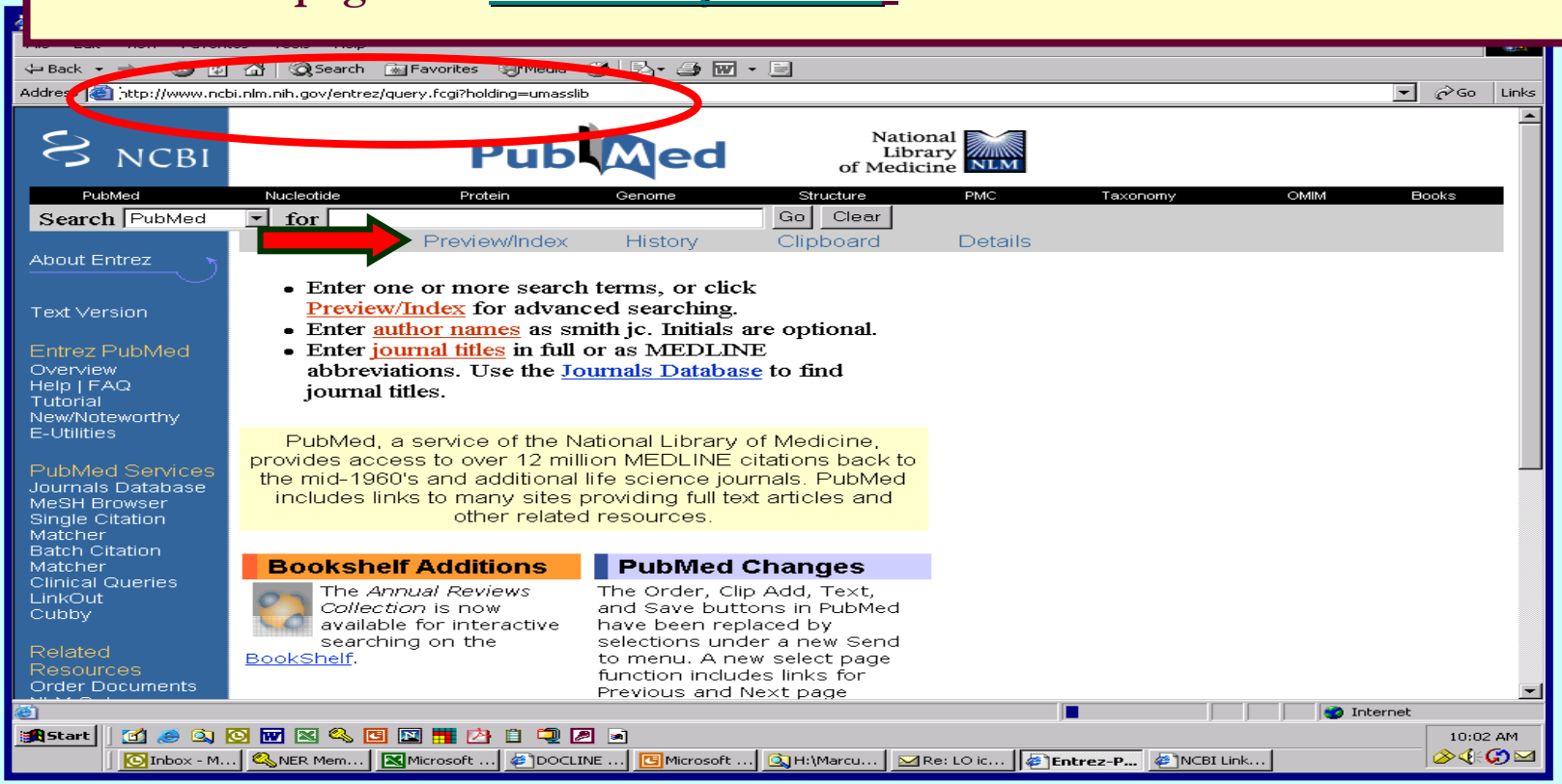
http://www.ncbi.nlm.nih.gov/entrez/query.fcgi?holding=umasslib

➲NAVIGATION

TO VERIFY LIBRARY LINKS:

a. Enter the PubMed database with your "special URL".

b. Click on page link **Preview/Index** link located under the Search bar.



➲NAVIGATION

TO VERIFY LIBRARY LINKS:

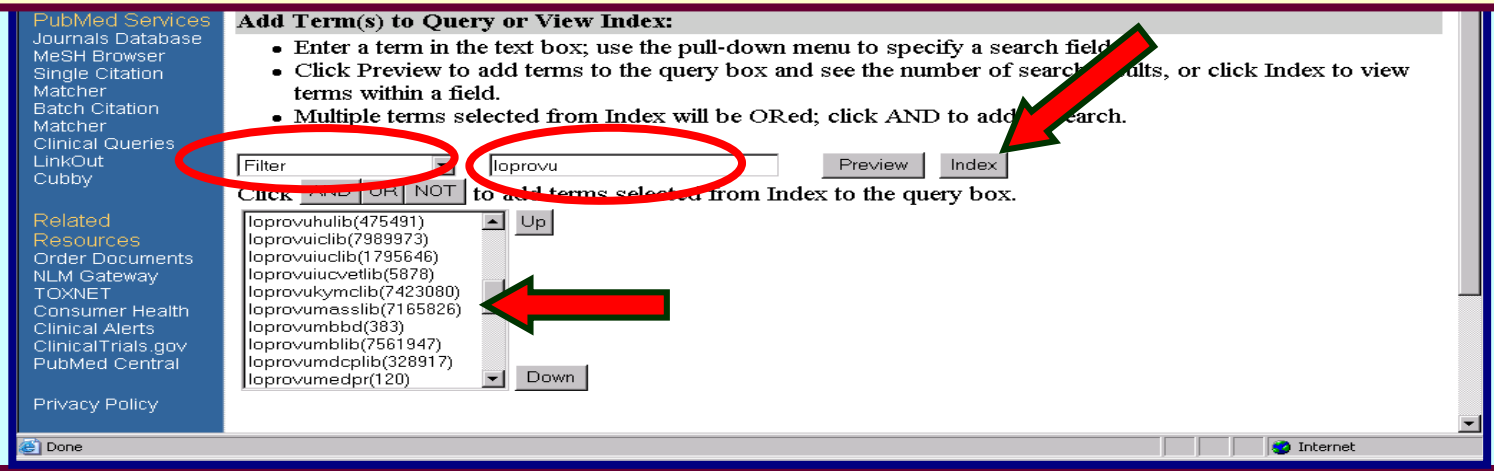
c. Bottom left of screen, select "**Filter**" from drop-down list box.

d. In the blank field to the right, enter "**loprov+ first letter**" of User Name.

e. Clicking on the **Up** **Down** arrows below, scroll and highlight your "**UserName**" in the list box.

(**Note**: number of links created thus far for your library set in parentheses.)

f. Click on **Index** button.

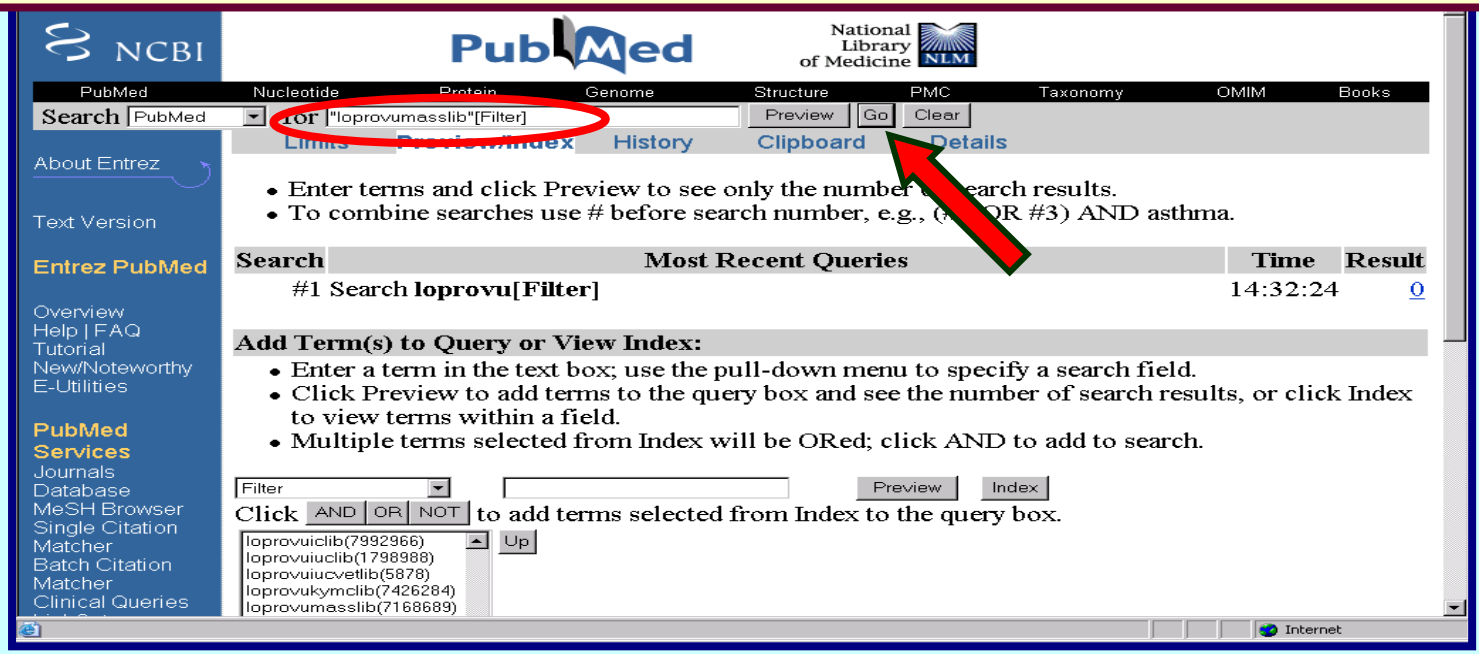


➲NAVIGATION

TO VERIFY LIBRARY LINKS:

g. At the top of your screen, note the filter added to the search criteria.

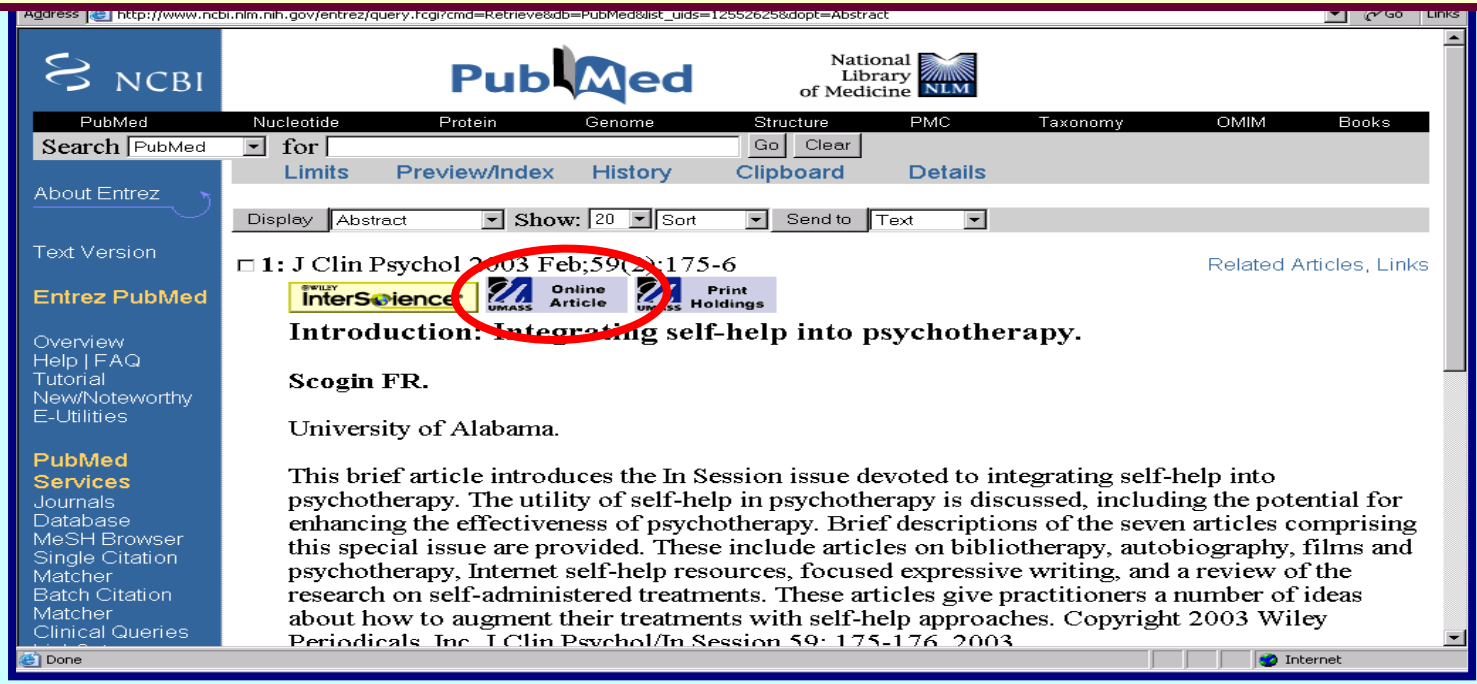
h. Click on GO button.



➲ NAVIGATION

TO VERIFY LIBRARY LINKS:

i. Click on the link for any article; note display of your library's icon.



LinkOut Participation

For E-Journal Holdings

Let's Review the Seven Steps to e-Journal LinkOut Participation

Step 1. Familiarize → *read about LO program*

Step 2. Organize → *review e-journal subscriptions*

Step 3. Register → *sign up with NLM*

Step 4. Icon-ize → *create and store library icon*

Step 5. Input → *enter library e-journal holdings*

Step 6. Activate → *display full-text access to holdings*

Step 7. Publicize → *let patrons know about collection*

LinkOut Participation

For E-Journal Holdings

QUESTIONS ???

LinkOut Participation for E-Journal Holdings

LinkOut Participation

For Print Holdings

LinkOut-SERHOLD Interface

How does it work?

- LinkOut displays print holdings information already stored in the DOCLINE system as "SERHOLD" records.
- The LinkOut-SERHOLD interface is a "batch" process: updates are viewed in PubMed at noon the next business day.
- Record updating in the SERHOLD program in DOCLINE is an "online" process: updates are viewed immediately, in real-time.
- Print holdings information is displayed for PubMed citations relating to the serial holdings records created in SERHOLD.

LinkOut Participation

For Print Holdings

LinkOut-SERHOLD Interface

How do I register?

- **Requirements:**
  - library is a DOCLINE participant (with assigned "LIBID")
  - library maintains print holdings information in SERHOLD.
- Once logged in to the Submission Utility, Registration function may be accessed from the left blue sidebar.
- Fields required for registration: LIBID, location of print holdings, and the URL for the library's OPAC (*optional*).
- Program has a cancel function which may be accessed at any time (*see*: Cancellation function.)

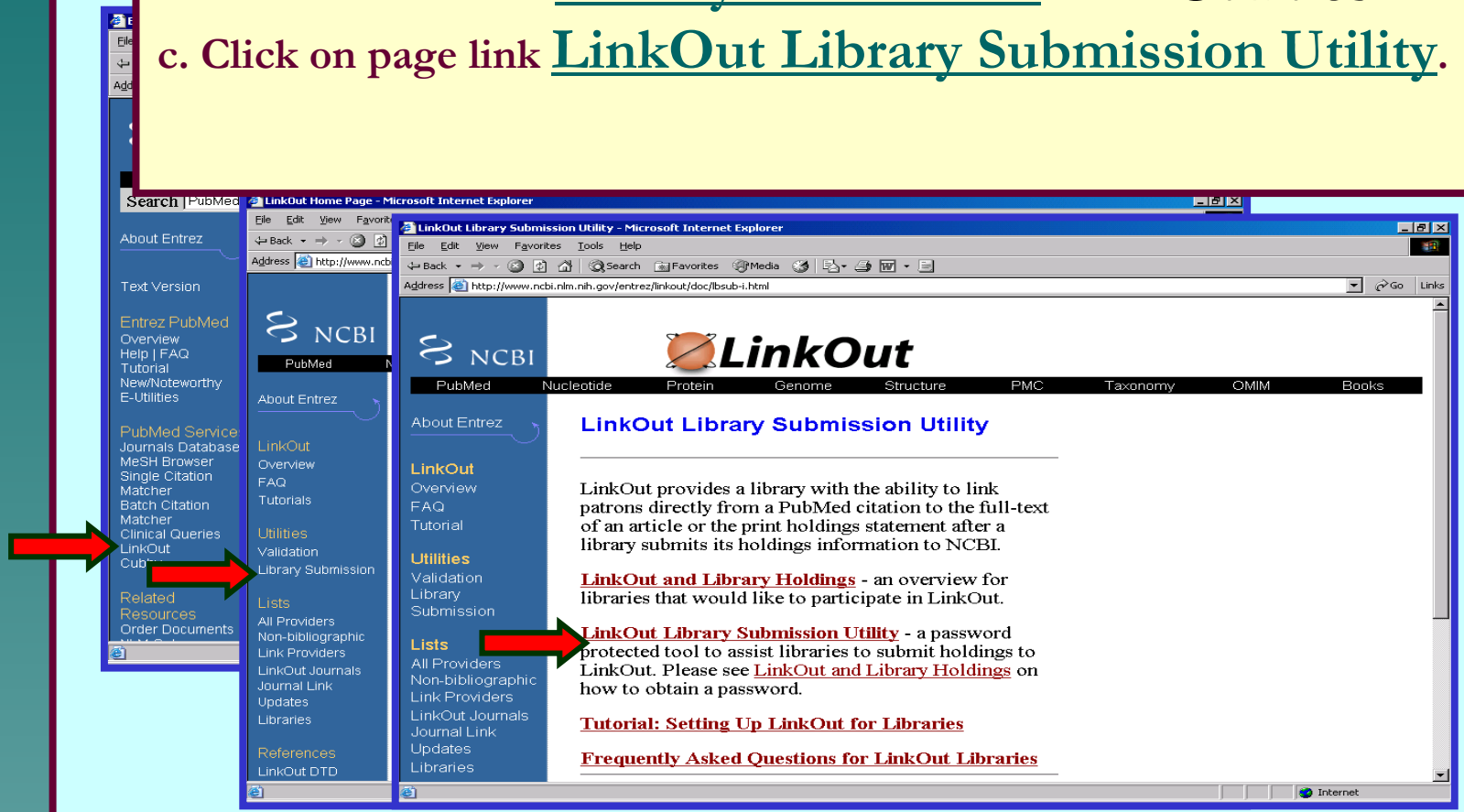
➲NAVIGATION

TO REGISTER FOR PRINT HOLDINGS PARTICIPATION:

a. Select sidebar link **LinkOut** under **PubMed Services** header.

b. Select sidebar link **Library Submission** under **Utilities** header.

c. Click on page link **LinkOut Library Submission Utility**.

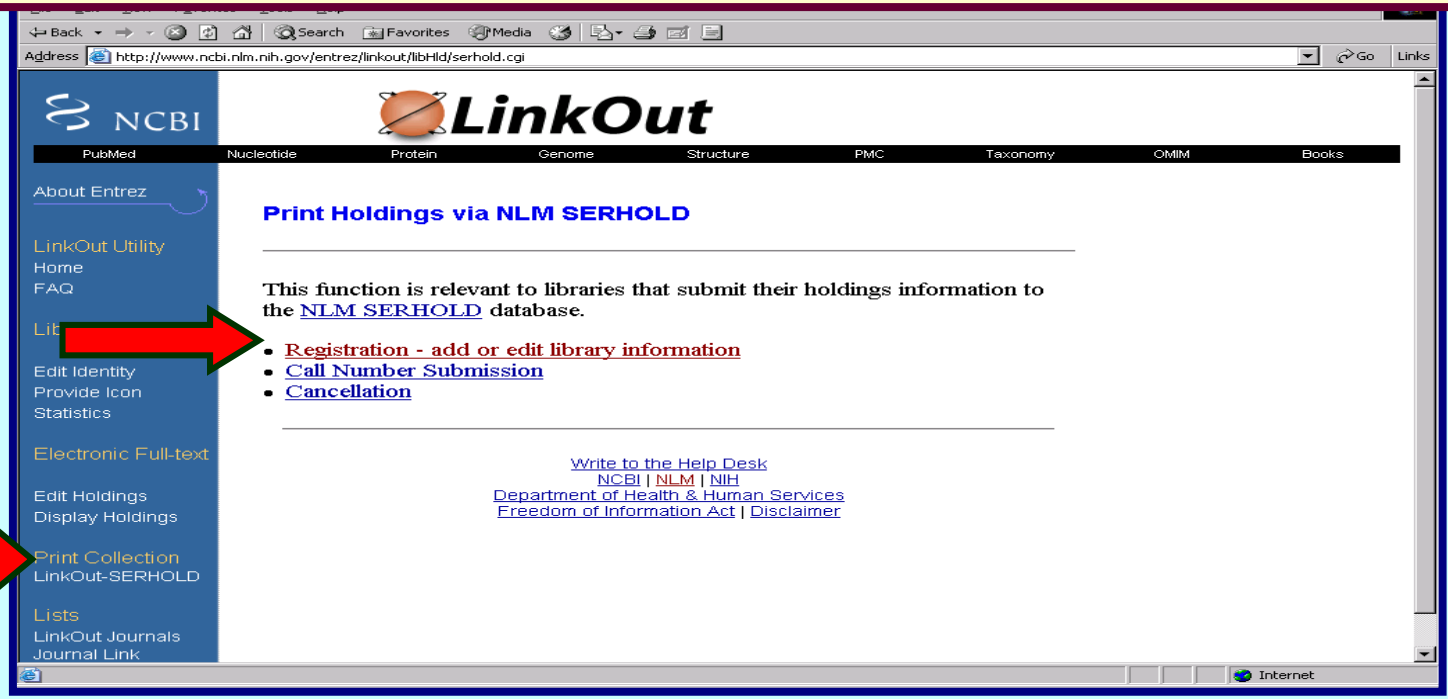


➲ NAVIGATION

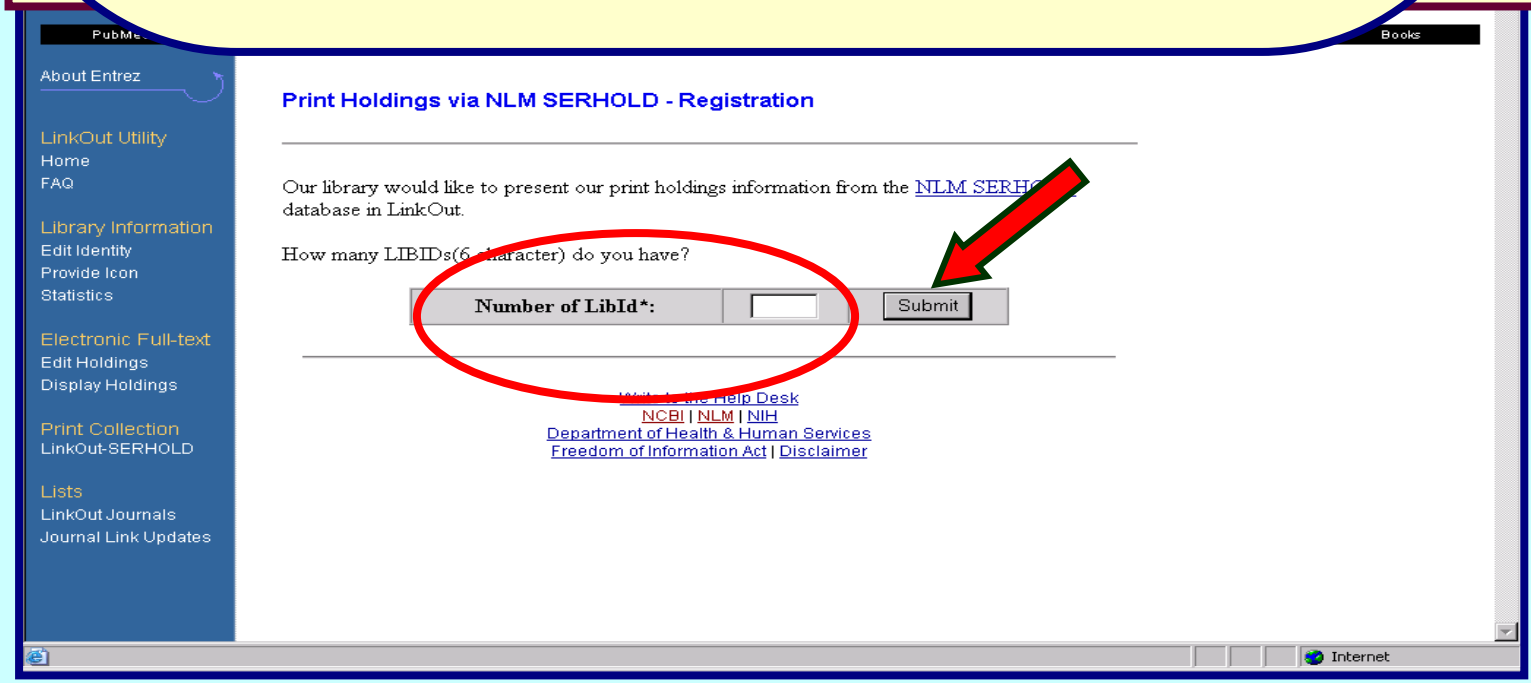
TO REGISTER FOR PRINT HOLDINGS PARTICIPATION:

d. Select sidebar link LinkOut-SERHOLD under **Print Collection** header.

e. Click on page link: Registration – add or edit library information.



Note: multiple libraries within an institution may want to share a single LinkOut account. This holds true in cases where SERHOLD records are stored under separate LIBID's (DOCLINE accounts.) *See* "Advanced Features" below.



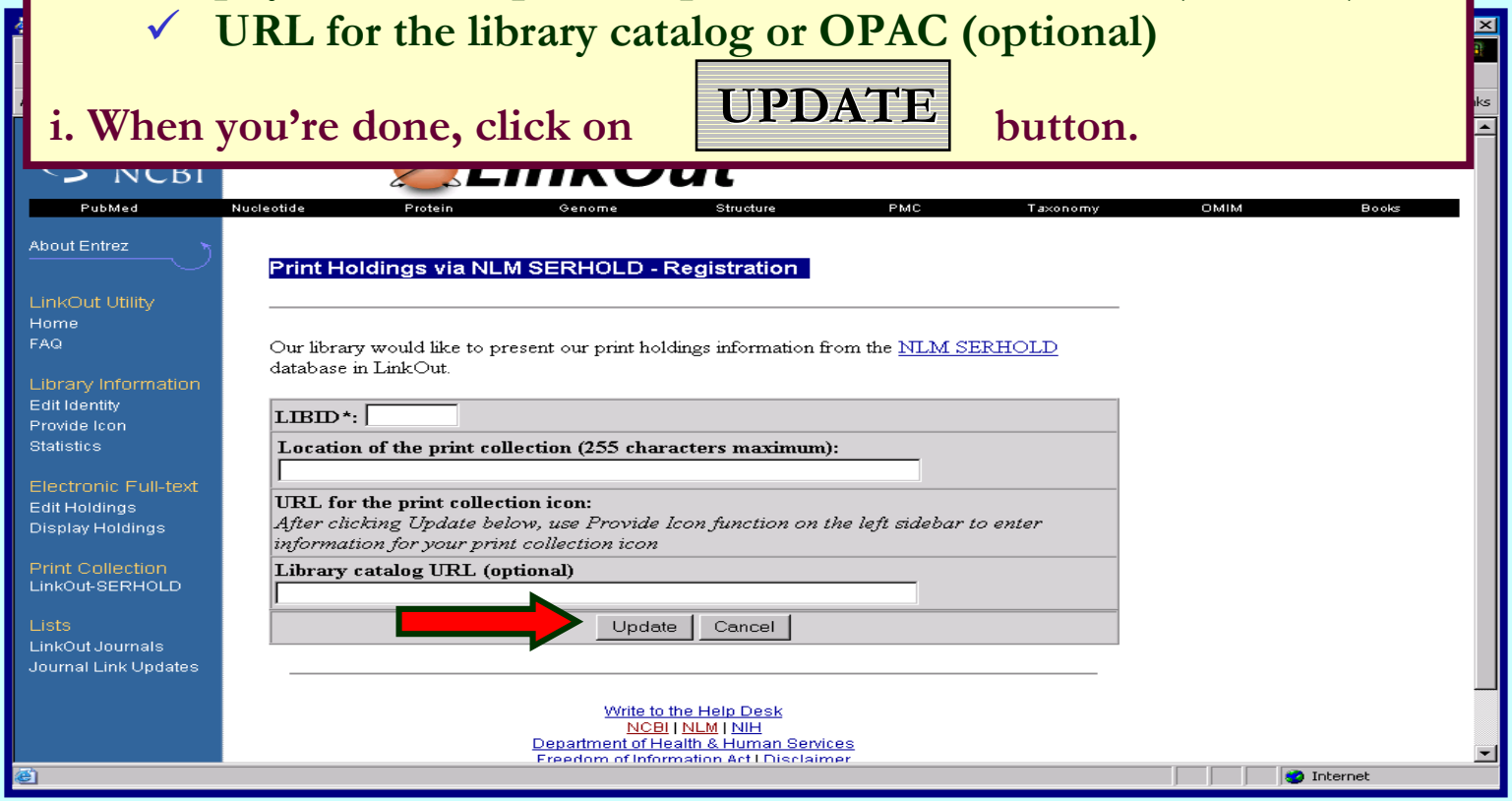
➲ NAVIGATION

TO REGISTER FOR PRINT HOLDINGS PARTICIPATION:

h. Fill in two-to-three fields:

- ✓ **LIBID (DOCLINE's "library identifier")**
- ✓ **physical description of print collection location (free text)**
- ✓ **URL for the library catalog or OPAC (optional)**

i. When you're done, click on UPDATE **button.**



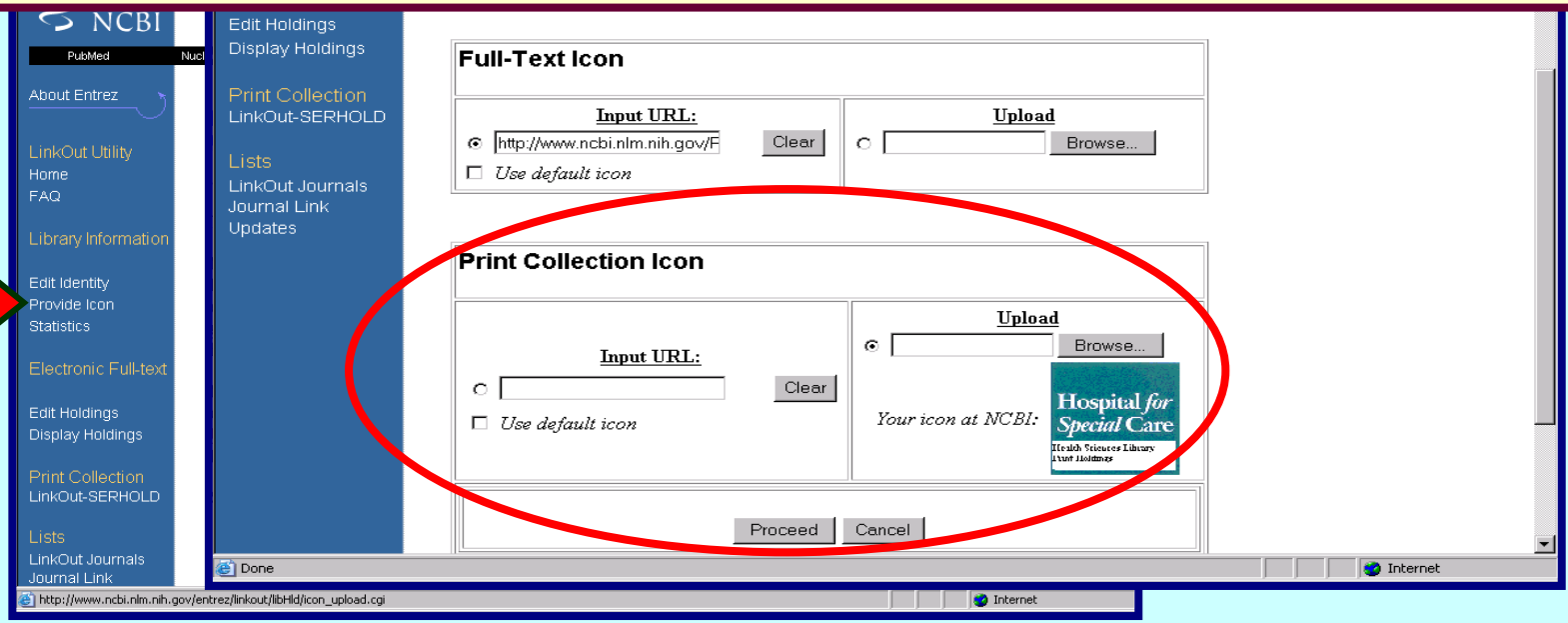
➲NAVIGATION

TO UPLOAD PRINT HOLDINGS ICON:

a. From within the Library Submission Utility, select sidebar link Provide Icon, under Library Information header.

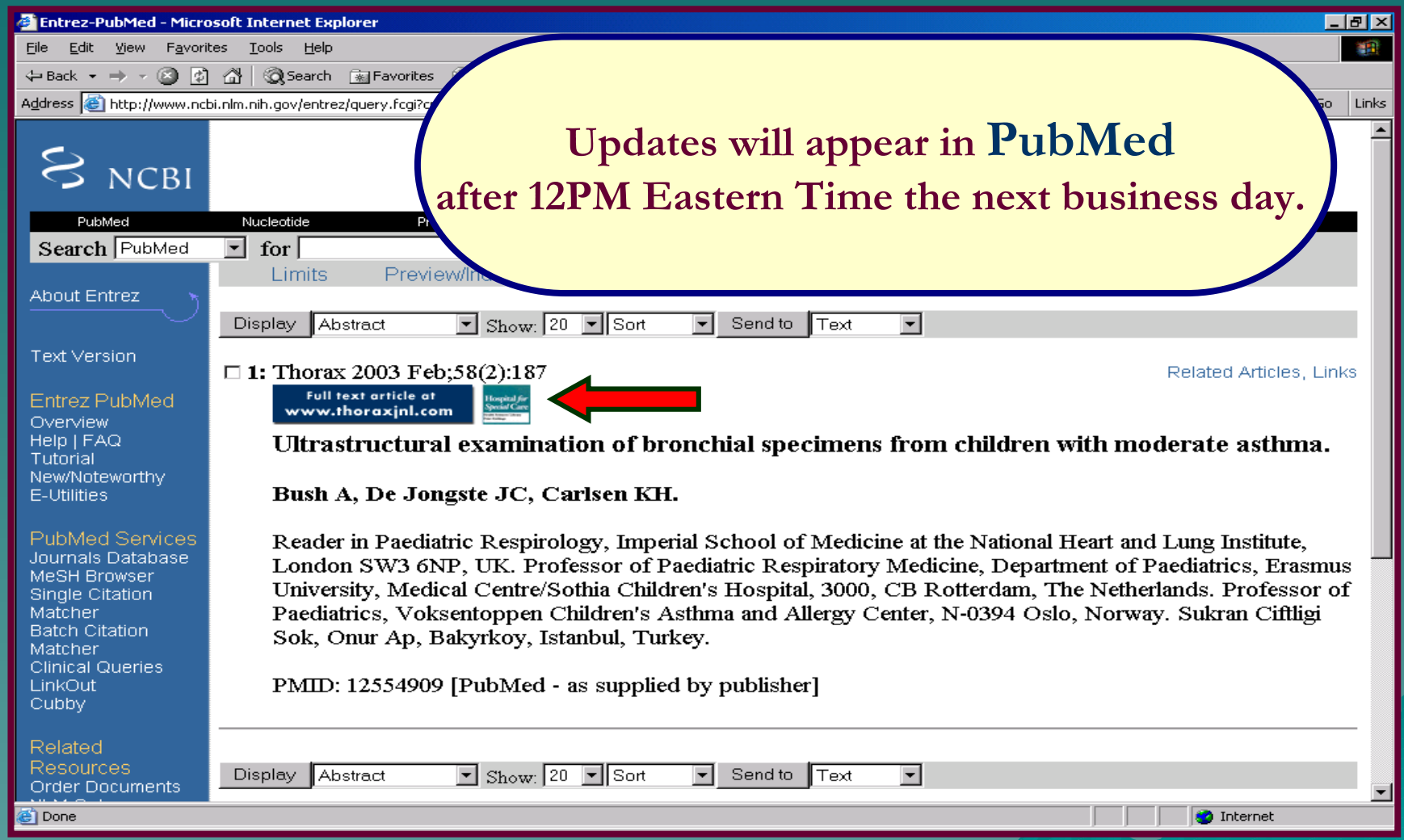
b. Click right radio button and **Browse** button to upload your icon.

c. Click on **Proceed** button to transmit icon to NCBI.



LinkOut Participation

For Print Holdings

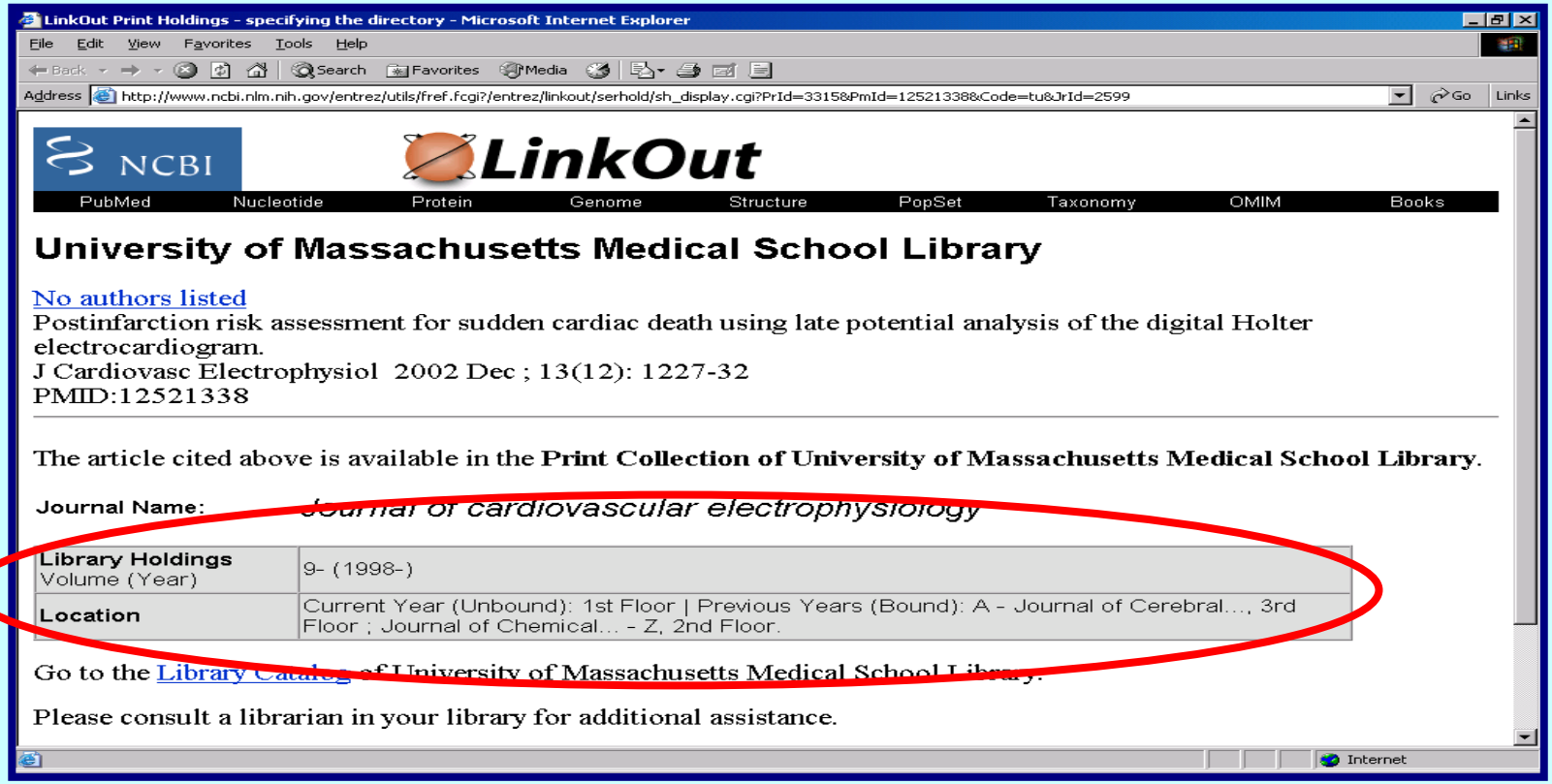


Updates will appear in PubMed after 12PM Eastern Time the next business day.

LinkOut Participation

For Print Holdings

Print Holdings (cont'd)

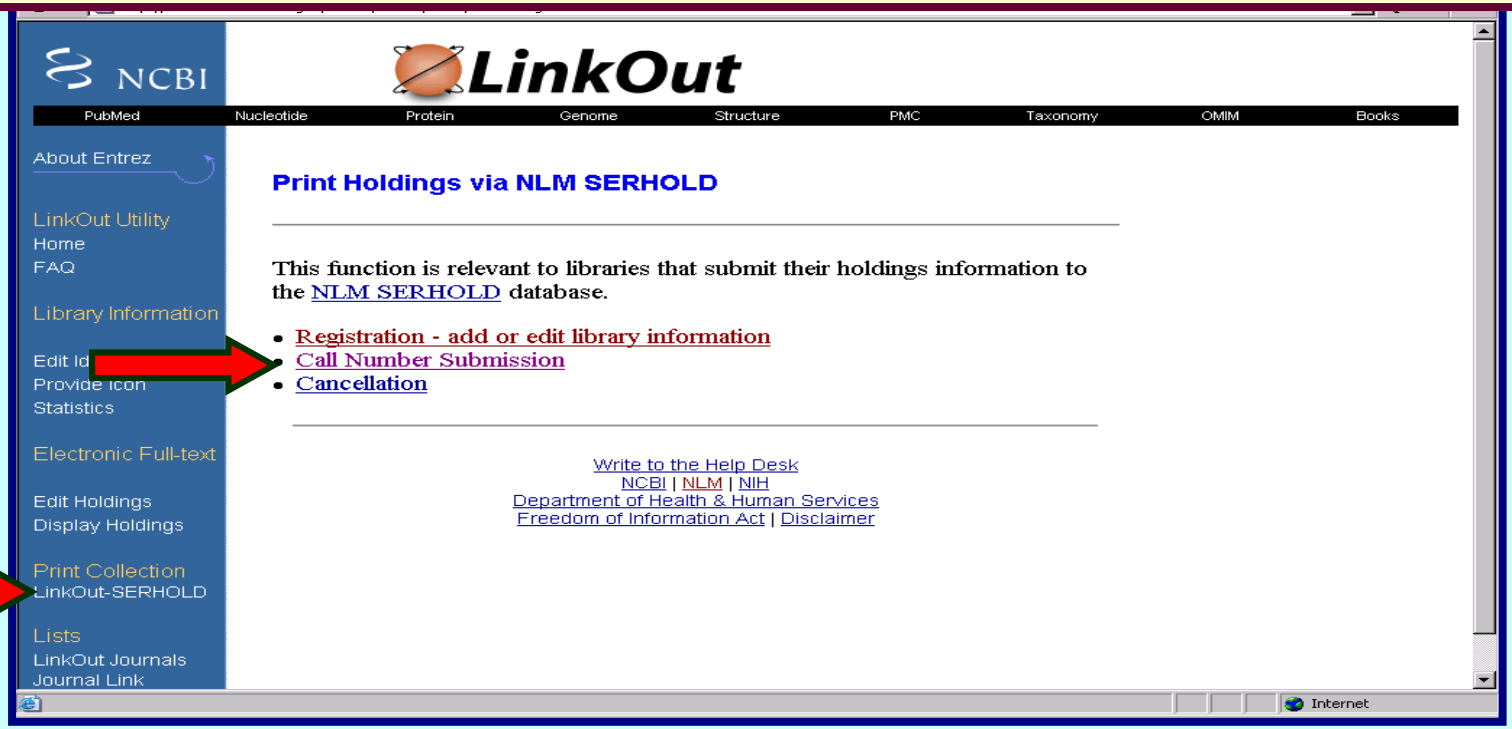


➲ NAVIGATION

TO SUBMIT CALL NUMBERS:

a. Select sidebar link LinkOut-SERHOLD, under **Print Collection** header.

b. Click on page link Call Number Submission.

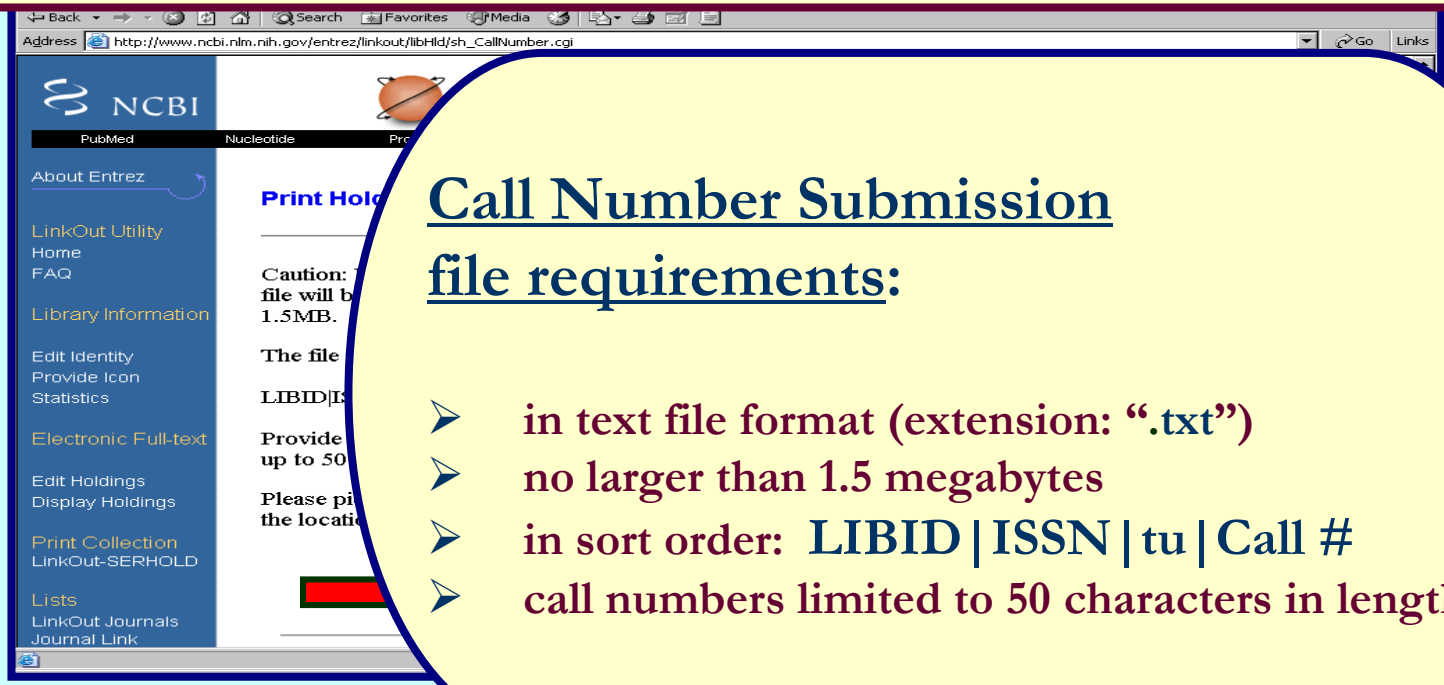


➲ NAVIGATION

TO SUBMIT CALL NUMBERS:

c. Click on **Browse** button to locate file on your local or shared drive.

d. Click on **Upload** button to send your file to NCBI.



Call Number Submission file requirements:

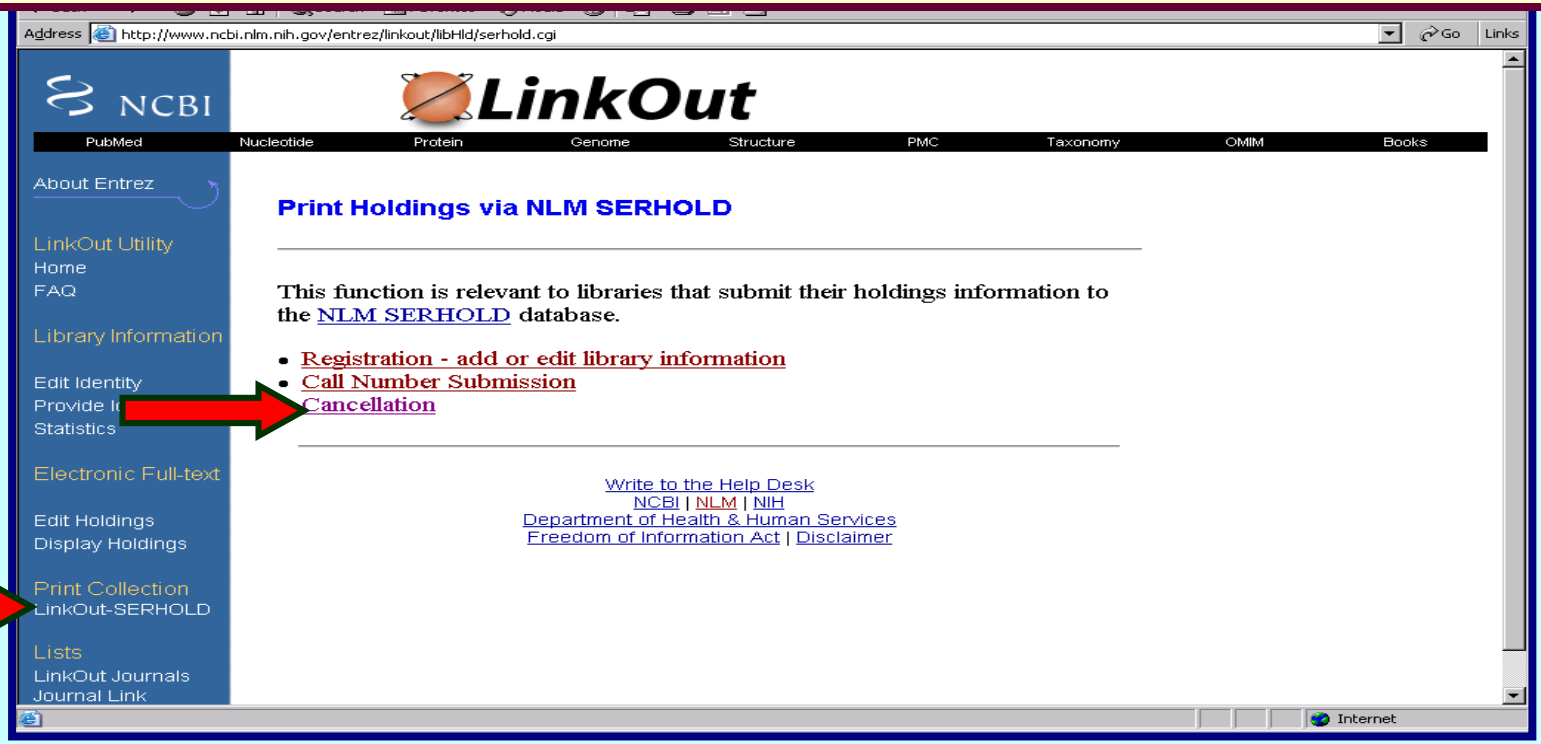
- in text file format (extension: ".txt")
- no larger than 1.5 megabytes
- in sort order: LIBID | ISSN | tu | Call #
- call numbers limited to 50 characters in length

➲ NAVIGATION

TO CANCEL PRINT HOLDINGS PROGRAM.

a. Select sidebar link LinkOut-SERHOLD, under **Print Collection** header.

b. Click on page link Cancellation.



LinkOut Participation

Advanced Features

Advanced Features

- **LinkOut to Multiple Libraries' Holdings**

  You can display multiple icons for libraries with separate print collections and LinkOut accounts (*ex.* to have patrons avail themselves of an institution's combined resources.)

  www.ncbi.nlm.nih.gov/entrez/query.fcgi?holding=alib,blib,clib

- **Limit PubMed Search for Your Library Links**

  As we covered earlier, you can limit a PubMed search to include only those citations for which your library has established links:

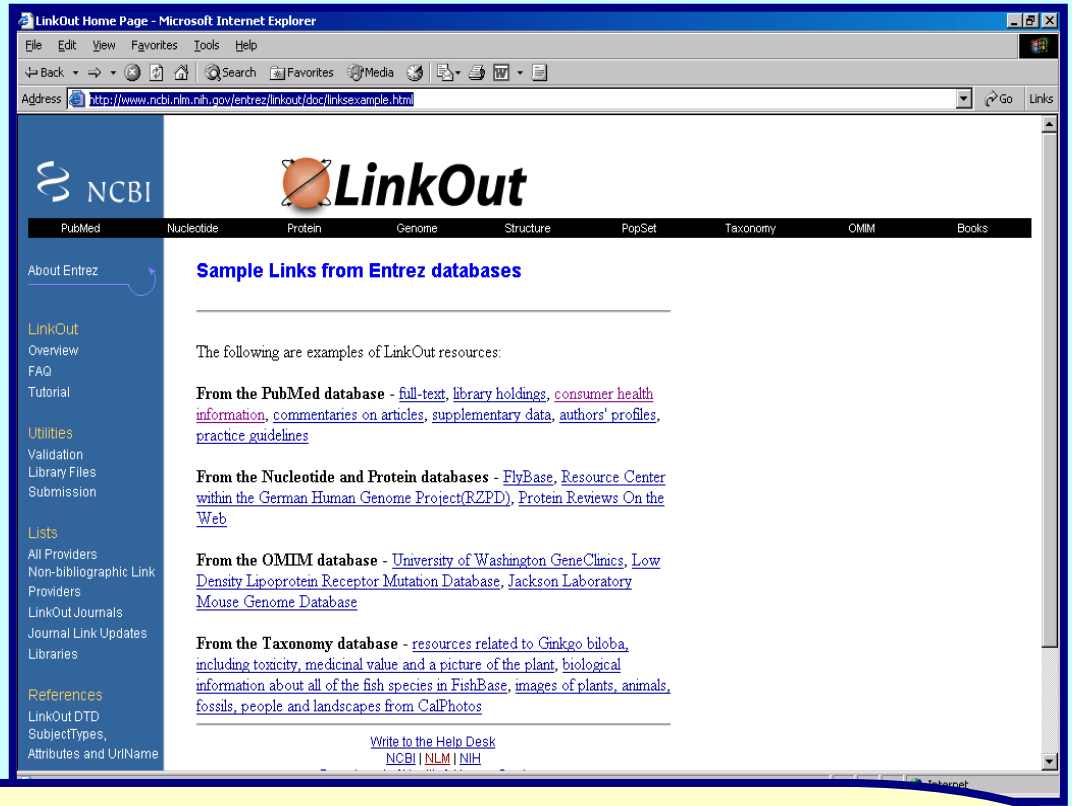
  loprov{username}[filter]

LinkOut Participation

Advanced Features

Sample Resources Page

***LinkOut** is designed to be a "jumping off" point to a variety of related resources on the web!*

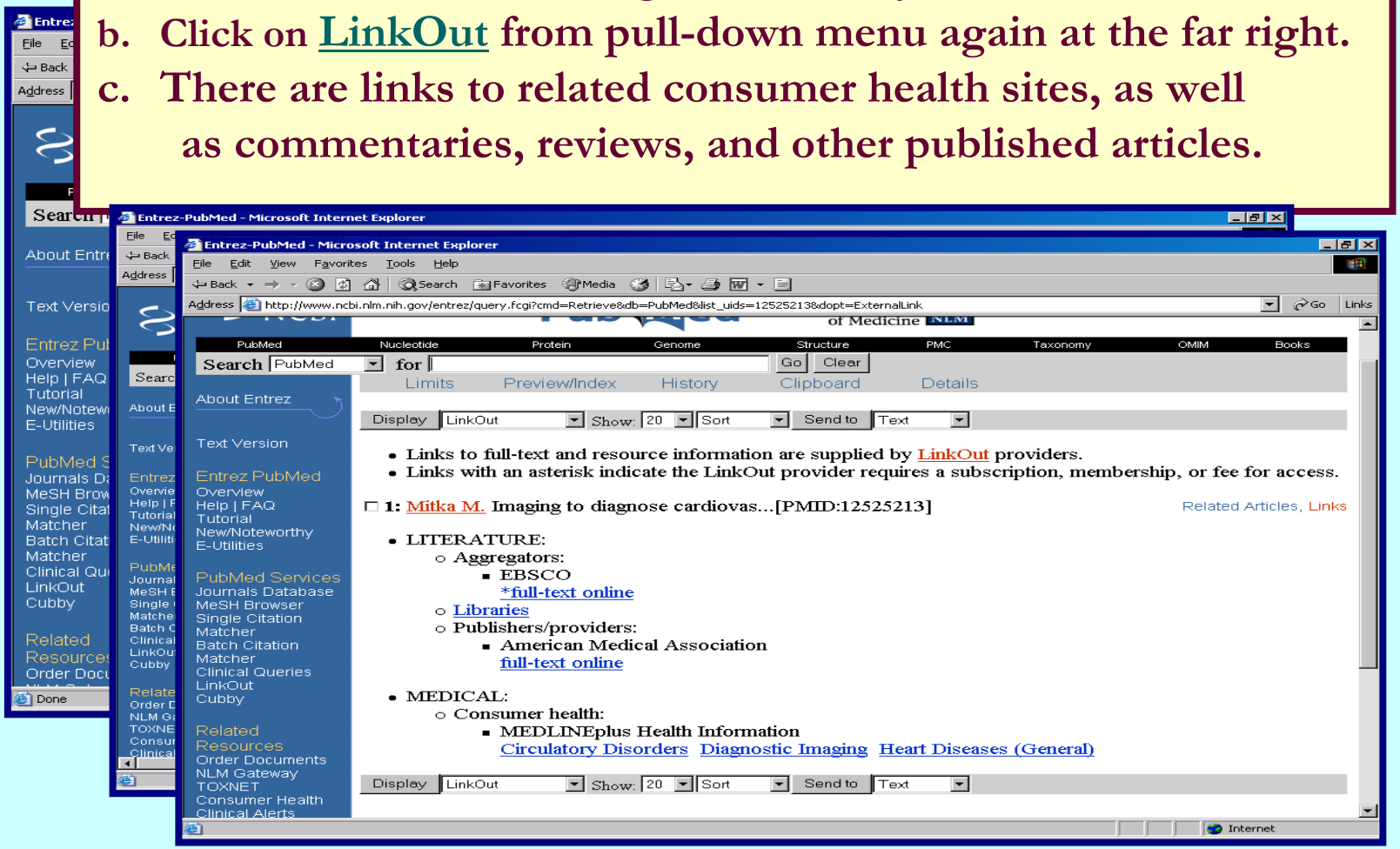


http://www.ncbi.nlm.nih.gov/entrez/linkout/doc/linksexample.html

➲NAVIGATION

TO ACCESS RELATED INFORMATION:

a. Click on Links at the far right column of your screen.
b. Click on LinkOut from pull-down menu again at the far right.
c. There are links to related consumer health sites, as well as commentaries, reviews, and other published articles.



LinkOut Participation

Links

Laudable Links

1. http://www.ncbi.nlm.nih.gov/entrez/linkout/doc/linkoutoverview.html
2. http://nnlm.gov/libinfo/ejournals/linkout
3. http://www.ncbi.nlm.nih.gov/entrez/linkout/doc/liblofaq.html
4. http://www.ncbi.nlm.nih.gov/entrez/linkout/doc/linksexample. html
6. http://www.ncbi.nlm.nih.gov/entrez/journals/newjournals_prov.html
7. http://www.ncbi.nlm.nih.gov/entrez/linkout/doc/linktutorial.html
8. http://nnlm.gov/ner/DocumentDelivery.html#linkout

LinkOut

Future Support

YOUR *LinkOut* REPRESENTATIVE:

Mark Goldstein

NN/LM NER

mark.goldstein@umassmed.edu

Phone: 508-856-5964

Fax: 508-856-5977